



Indiana State  
Department of Health



# **Indiana Newborn Screening Tracking & Education Program (INSTEP)**

## **User Guide**

## **Welcome**

Welcome to the Indiana Newborn Screening Tracking & Education Program (INSTEP)! This web-based application was developed by the Indiana State Department of Health (ISDH) Newborn Screening (NBS) Program in order to help ensure that all children born in Indiana receive the best possible care related to newborn screening. The mission of the Newborn Screening Program involves:

- Ensuring that every baby born in Indiana receives state-mandated screening;
- Ensuring that every infant with a presumptive positive or abnormal newborn screen receives appropriate, timely confirmatory testing and treatment and that the family receives genetic counseling; and
- Promoting public awareness and education about genetic conditions, genetic services, and newborn screening.

The Newborn Screening Program believes that the use of INSTEP will help achieve these goals by providing a centralized, web-based location for data entry and management. INSTEP will improve access to population-based, integrated, real-time data (including newborn screening results) for birthing facilities, health care providers, and NBS Program personnel. Data from INSTEP will also be used to enhance current standards of care for children diagnosed with newborn screening conditions.

This User Guide will provide you with guidance for the tasks that you will be performing in INSTEP. If you have additional questions about INSTEP, please contact ISDH.

Thank you for your participation in this exciting new application!

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## Registering for a Gateway Account

**New users** who don't have an existing ISDH Gateway account must register with the Gateway before access to INSTEP will be granted. **Please make sure you have the Gateway security code that was e-mailed to you after your INSTEP MSR training class—you'll need it to complete the registration process.**

**NOTE:** You cannot share your user name or password with anyone within or outside your organization. Anyone who is interested in using INSTEP **must** attend an INSTEP training **in person** before he/she will be allowed access to INSTEP. **Sharing your user name/password or signing up a non-trained person for an INSTEP account are direct violations of ISDH's security guidelines.**

In order to create an account within the Gateway:

1. Open your Internet browser and go to <https://gateway.isdh.in.gov>.
2. Click the "Create New Account" link underneath the user name/password boxes.



3. Enter the user name you would like to use, the Gateway security code, and your primary e-mail address. Click "Next." The Gateway security code was provided in the e-mail sent after your INSTEP MSR training class.

Begin

Step 1: Organization

Step 2: User Detail

Step 3: Contact Info

Fields with an (\*) indicate they are required.

Before you begin the next three steps, please enter the user name you would like to use, primary email, and the security code for the application you are registering for.

"Security Code" is required for registration. It is a code which identifies the application you will be accessing within ISDH Gateway.

\* User Name:

\* Security Code:

\* Email (Primary):

Next >>

Preview (Required Fields)

Application: ----

UserName: ----

First Name: ----

Last Name: ----

Email (Primary): ----

Phone (primary): ----

Organization(s):

Send me a confirmation email. ☐

Create Account

Cancel

#### 4. In the Organization Information section:

- For **non-ISDH users**, select the Organization Type *Hospitals – Acute Care* and select your organization from the drop-down list. Click “Next.”
- For **ISDH users**, select the Organization Type *Government – State* and select *Indiana State Department of Health*. Click “Next.”

Begin Step 1: Organization Step 2: User Detail Step 3: Contact Info Preview (Required Fields)

Fields with an (\*) indicate they are required.

Organization information is used to identify the organization(s) you belong to. At least one organization is required to register. If the organization can not be found, please send a request for ISDH staff to add it now. [Send New Organization Request](#)

Organization Type:  
Hospitals - Acute Care

Select your organization:

- ACL LABORATORIES
- ADAMS MEMORIAL HOSPITAL
- ALL ABOUT WOMEN & BABIES
- AUBURN BIRTHING CENTER

<< Back Next >>

Application: INSTEP  
UserName: INSTEP Test User  
First Name: ----  
Last Name: ----  
Email (Primary): instep@isdh.in.gov  
Phone (primary): ----  
Organization(s):  
Send me a confirmation email. ☐  
Create Account Cancel

#### 5. Complete the User Detail section by providing required information (password, first name, last name). You can leave the other fields blank.

- Passwords must be a minimum of 8 characters in length and must contain an upper case letter, a lower case letter, and one number. Please select a password that you will remember!!
- Click “Next.”

Begin Step 1: Organization Step 2: User Detail Step 3: Contact Info Preview (Required Fields)

Fields with an (\*) indicate they are required.

User information is unique criteria which identifies your account and is used to access ISDH Gateway.

\* Password:   
Confirm Password:   
\* First:   
Middle:   
\* Last:   
Title: Other  
License #:   
Expiration Date:   
Date of Birth:   
Driver License #:

<< Back Next >>

Application: INSTEP  
UserName: INSTEP Test User  
First Name: ----  
Last Name: ----  
Email (Primary): instep@isdh.in.gov  
Phone (primary): ----  
Organization(s):  
INDIANA STATE DEPARTMENT OF HEALTH  
Send me a confirmation email. ☐  
Create Account Cancel

**6. Complete the “Contact Info” section.**

- a. The only required portion of this section is your primary telephone number. You can fill in the other fields or leave them blank.
- b. Click “Confirm and Create Account” at the bottom of the left-hand side of the screen.

Begin Step 1: Organization Step 2: User Detail Step 3: Contact Info Preview (Required Fields)

Fields with an (\*) indicate they are required.

Primary contact information is only used to contact you in case of any possible account trouble. (For example, the email you enter will be used to recover/reset your lost account password.) Once registered, contact information can be updated under "My Profile".

Address:   
City:   
County:   
Zip:   
Address Type:   
\* Phone 1:   
Type:   
Phone 2:   
Type:   
Email (Secondary):   
Supervisor Information  
Name:   
Phone:   
Email 1:   
Email 2:   
<< Back Confirm & Create Account >>

**7. Click the “Create Account” button on the right-hand side.**

Begin Step 1: Organization Step 2: User Detail Step 3: Contact Info Preview (Required Fields)

Fields with an (\*) indicate they are required.

Primary contact information is only used to contact you in case of any possible account trouble. (For example, the email you enter will be used to recover/reset your lost account password.) Once registered, contact information can be updated under "My Profile".

Address:   
City:   
County:   
Zip:   
Address Type:   
\* Phone 1: (999) 999-9999 x  
Type:   
Phone 2:   
Type:   
Email (Secondary):   
Supervisor Information  
Name:   
Phone:   
Email 1:   
Email 2:   
<< Back Confirm & Create Account >>

Application: INSTEP  
UserName: nbstest123  
First Name: NBS  
Last Name: TEST  
Email (Primary): nbstest@isdh.in.gov  
Phone (primary): (999) 999-9999 x  
Organization(s): INDIANA STATE DEPARTMENT OF HEALTH  
Send me a confirmation email. ☐  
Create Account Cancel

8. *Your request for access to INSTEP will be reviewed by a Gateway administrator. You will receive e-mail notification from the Gateway when your request has been approved.*

## **Resetting your Gateway Password**

If you forget your Gateway password, follow these instructions to reset it:

1. Open your Internet browser and go to <https://gateway.isdh.in.gov>.
2. Click the “**Recover Password**” button on the toolbar.
3. Enter your Gateway user name and click the “**Submit**” button.
4. After submission, an e-mail with further instructions will be sent to you.

## **Requesting Access to INSTEP (for EARS or other Gateway Users)**

Some INSTEP users may already have Gateway accounts because they use the Gateway to access EARS (the EHDI Alert Response System) or other ISDH web-based applications. Current Gateway users will need to request access to the INSTEP web-based application through the Gateway.

**NOTE:** You cannot share your user name or password with anyone within or outside your organization. Anyone who is interested in using INSTEP **must** attend a training **in person** before he/she will be allowed access to INSTEP. **Sharing your user name/password or signing up a non-trained person for an INSTEP account are direct violations of ISDH's security guidelines.**

If you are a current Gateway user and wish to request access to INSTEP:

1. Log into the Gateway at <https://gateway.isdh.in.gov>.
2. On the Gateway home screen, click the "My Profile" link at the top of the page.

Click the "My Profile" link in the upper right corner of your Gateway home screen.





3. Click the “My Applications” tab.

Click the "My Applications" tab.

The screenshot shows the Indiana State Department of Health State Health Gateway (Test/QA) interface. The header includes the state seal and navigation links: App Admin, My Profile, Home. The user is logged in as Courtney Eddy. A red arrow points to the 'My applications' tab in the 'My Profile' section. The profile form contains the following fields:

- User Name: Cddy
- Email (Primary): cddy@isdh.in.gov
- Phone (Primary): 999999999
- Phone (Secondary):
- Address(es): No addresses listed. [Add New Address](#)

Account Created: 7/25/2008 9:21:20 AM

Save Changes

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4. Click the “Request Application Access” button.

Click the "Request Application Access" button.

The screenshot shows the Indiana State Department of Health State Health Gateway (Test/QA) interface. The header includes the Indiana State Seal, the text "INDIANA STATE DEPARTMENT OF HEALTH STATE HEALTH GATEWAY (Test/QA)", and user information: "App Admin My Profile Home" and "Logged in as Courtney Eddy | Logout". The main navigation bar contains links for CF2, HIPAA Centers, IBDPR, IBDPR Reports, INSTEP, Organization Mgmt, and SC2. Below this, the "My Profile" section is active, showing tabs for "Contact Info", "My Organizations", "My Applications", and "Change Password". The "My Applications" tab is selected, displaying a "Request Application Access" button. Below the button is a table with two columns: "My Application(s)" and "Set which app to show after login". The table lists various applications with radio buttons for selection.

My Application(s)	Set which app to show after login
CF2	<input type="radio"/>
HIPAA Centers	<input type="radio"/>
Indiana Birth Defects and Problems Registry	<input type="radio"/>
IBDPR Reports	<input type="radio"/>
INSTEP	<input type="radio"/>
Organization Management	<input type="radio"/>
SC2	<input type="radio"/>
Home	<input checked="" type="radio"/>

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5. Enter the Gateway security code. Click “Submit.”
  - a. **NOTE:** The Gateway security code was e-mailed by ISDH after your INSTEP MSR training. If you have deleted this e-mail, please contact ISDH to request the code again.

Enter the Gateway security code that was e-mailed to you after your INSTEP MSR training.

Click "Submit" when finished.

INDIANA STATE DEPARTMENT OF HEALTH  
STATE HEALTH GATEWAY  
(Test/QA)

App Admin My Profile Home

Logged in as Courtney Eddy Logout

CF2 HIPAA Centers IBOPR IBOPR Reports INSTEP Organization Maint SC2

Home > MyProfile

Contact Info My Organizations My applications Change Password

Security Code:

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6. ***Your request for access to INSTEP will be reviewed by a Gateway administrator. You will receive e-mail notification from the Gateway when your request has been approved.***
7. Once your request for access to INSTEP is approved, you will have an active “INSTEP” tab on your Gateway home screen.

## Accessing INSTEP from the ISDH Gateway

After you register with the ISDH Gateway and your access to the INSTEP application has been verified, you will be able to access INSTEP through the Gateway. In order to sign in to the INSTEP application:

1. Open your Internet browser and go to <https://gateway.isdh.in.gov>.
2. Log in with your Gateway user name and password.
3. Click the “INSTEP” button in the toolbar to access the INSTEP application.



4. You will see the INSTEP welcome screen. All users will need to enter a “role security code” & agree to ISDH’s HIPAA policy when logging into INSTEP for the first time.

**NOTE:** *This is different from the Gateway security code for INSTEP!* The role security code was included in the e-mail sent after your INSTEP training.

**INSTEP**  
INDIANA NEWBORN SCREENING TRACKING AND EDUCATION PROGRAM

## New User Registration

Please complete the INSTEP registration process

**Registration Information**  
Thank you for logging in to ISDH Gateway. You have requested to use the INSTEP application. In an effort to protect the data that we transmit and receive, we must finalize your registration by determining your level of access. Please provide the requested information and then click the submit button. Please contact ISDH if you have questions.

Security Key:

Primary Organization:

**Attention**

This system contains information meeting the definition of Protected Health Information (PHI) as defined in 45 CFR 160.103 and is subject to HIPAA privacy and security requirements. Confidentiality of information contained in the system shall be protected at all times.

Through your use of the INSTEP system, you agree to abide by all applicable statutes, rules, and internal electronic resource security policies of your organization designed to protect the data from improper use or disclosure.

Specifically you agree that you:

- Will not share your username and password with anyone else
- Will not log in to the web site from unapproved computer locations
- Will not download, print, or copy data for unauthorized use
- Agree to abide by password guidelines set forth by the INSTEP system administrators as to length, complexity and frequency of updating passwords
- Agree to only utilize this system for authorized activities
- Shall immediately report any breaches of this information to your supervisor

Furthermore, you also agree not to hold the State of Indiana or its agents responsible for any erroneous data or information obtained while using this resource.

Unauthorized access is prohibited and all violators will be prosecuted to the fullest extent of the law. This includes criminal and civil prosecution, in state and federal courts. All access is logged and monitored for potential abuse.

[I Do Not Agree](#)

## Moving within INSTEP

As you move between screens in INSTEP, you may find that you wish to move back to the previous screen.

**INSTEP users *must* use the “back” button located at the bottom of INSTEP to move to the previous screen. Do NOT use the “back” arrow for your Internet browser.** Using the “back” arrow of your Internet browser may prevent INSTEP from saving the information you enter and may also prevent INSTEP from being correctly displayed on your computer.

INSTEP users should utilize the "Back" button at the bottom of the INSTEP screen to move to a previous screen. Do not use the back arrow within your Internet browser.



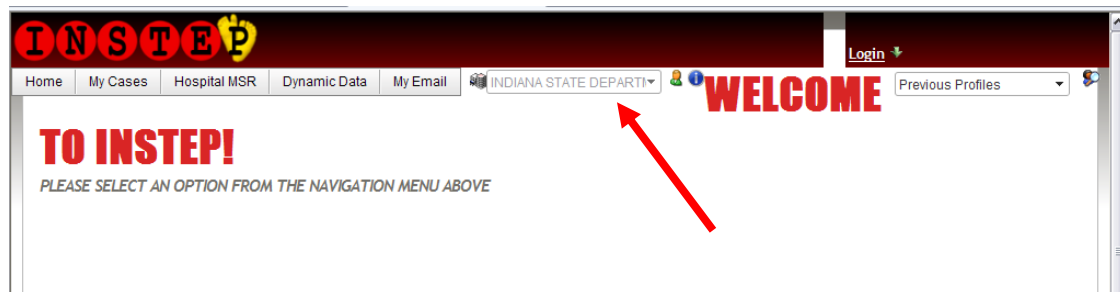
The screenshot shows the INSTEP web application interface. At the top is a navigation bar with links: Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, and Admin. Below this is a red banner with the text "Newborn Screening Exception Entry" and a subtext "Use this form to report exceptions to the newborn screening heel stick process." The main content area is titled "Identify Organization and Contact Details" and contains instructions: "Select the organization and contact reporting the exception. If the organization is not listed to create a new record." There are input fields for "Search organizations:" with a "Search" button and a "Clear" link, "Organization name:" with a dropdown menu showing "Indiana State Department Of Health", and "Contact name:" with a dropdown menu showing "Select a contact". There is also an "Add Contact" link. At the bottom of the form are two buttons: "<< Back" and "Next >>".



## Monthly Summary Reports (MSRs)

### Identifying Your Organization

Most users will not have to select an affiliated organization. Your primary organization will be assigned based on the information you enter during the Gateway registration process. However, **individuals who enter MSR information for more than one birthing facility** will be able to select the appropriate organization for a specific MSR by selecting the correct organization from the drop-down box located in the top middle of the INSTEP page.



## Adding a New Contact to Your Organization

On the Hospital MSR menu, INSTEP will first ask you to verify your name & contact information. **Please make sure that you select YOUR name for every MSR that you complete!**

If you need to add yourself as an MSR contact:

1. Click the “Add New Contact” link.

The screenshot shows the INSTEP web application interface. At the top is the INSTEP logo and navigation links: Home, Hospital MSR, My Email, and Person Search. The main heading is "Heelstick MSR Exception Entry" with a subtext: "Use this form to report exceptions to the heelstick newborn screening process." Below this is a section titled "Identify Organization and Contact Details" with instructions: "Select the organization and contact reporting the exception. If the organization is not listed, please contact ISDH. If the contact is not listed, click Add Contact to create a new record." There are two dropdown menus: "Organization name:" (set to "Select an organization") and "Contact name:" (set to "Eddy, Courtney"). Below the "Contact name:" dropdown is a red "Add Contact" link. The "Contact Information" section contains fields for Title (Administrator), First Name (Courtney), Last Name (Eddy), Phone Number ((317) 233-9260), and Email (CEddy@isdh.IN.gov). There is an "Edit Contact Information" link and navigation buttons "<< Back" and "Next >>".

2. Fill in your title, name, phone number, & e-mail address in the “Contact Information” fields.

**NOTE:** *Be sure to enter information in EVERY field—all fields are required!*

This screenshot is similar to the previous one but with different data and annotations. The "Organization name:" dropdown is set to "Memorial Hospital & Health Care Center (Isperet)". The "Contact name:" dropdown is set to "Cox, Janet". The "Add Contact" link is red. The "Contact Information" fields are empty except for the Title dropdown which is set to "Select a title". At the bottom left, a red arrow points to the "Save" link with the text "Click 'Save' when finished". On the right side, a red bracket groups the "Contact Information" fields, with the text "Fill in your contact information. Be sure to enter information in ALL of the fields on this screen!". The navigation buttons at the bottom are "<< Back" and "Next >>".

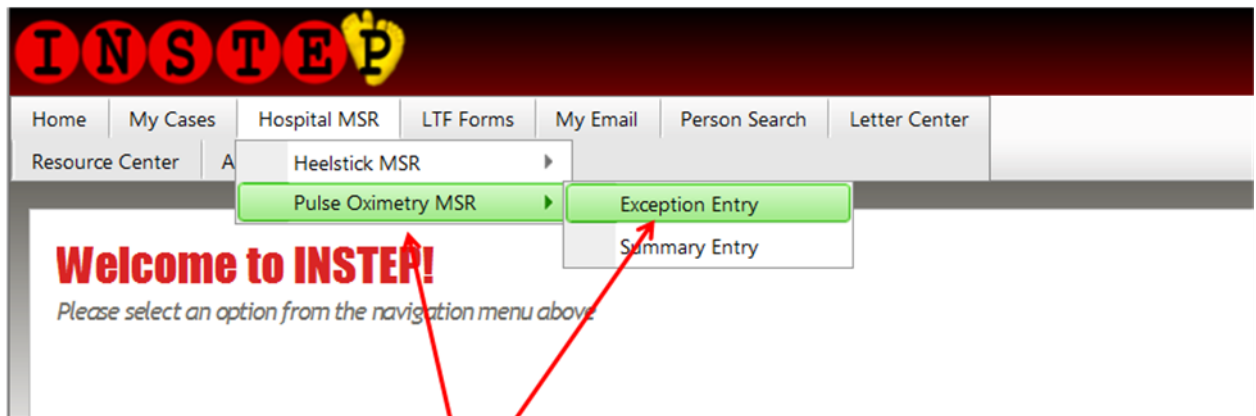
3. Click the “Save” link when finished. INSTEP will refresh & display your name & contact information. Click the “Next” button to begin entering your MSR information.



## Opening an MSR / adding a new MSR

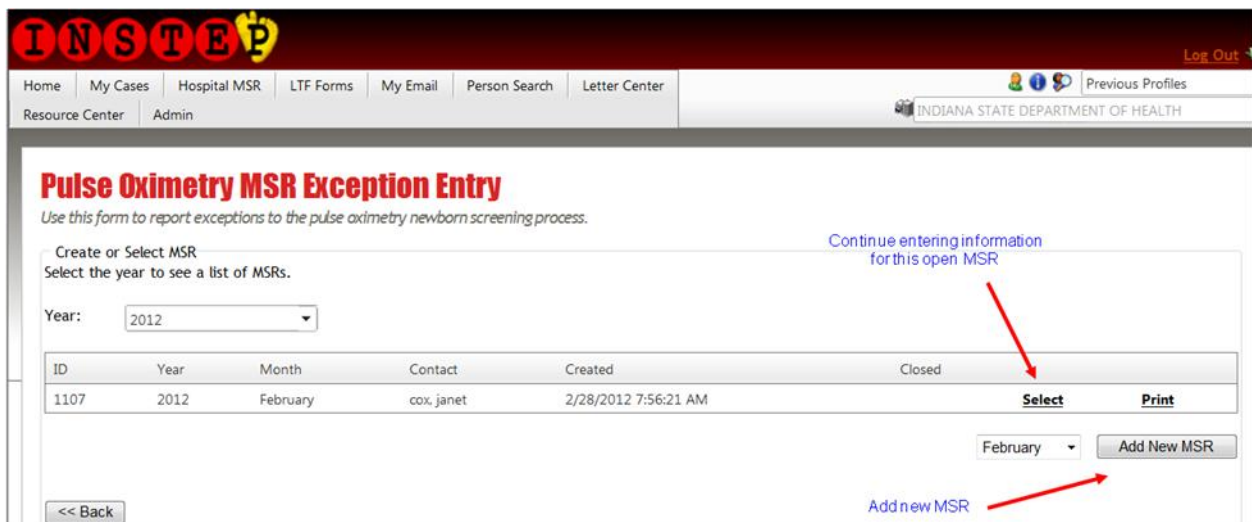
1. In order to begin entering MSR data, **hold your mouse cursor over the “Hospital MSR” tab at the top of the INSTEP welcome screen.** A drop-down list with “Pulse Oximetry MSR” will appear.
  - a. **Hover your mouse over “Pulse Oximetry MSR.”** Another menu will appear to the right.
  - b. **Click on “Exception Entry.”**

**NOTE:** If you do not have any exceptions for the month, please click “Summary Entry” and follow the steps below on the Summary Entry screen.



1. Hover your mouse over the “Hospital MSR” menu. A drop-down list will appear.
2. Hover your mouse over “Pulse Oximetry MSR.” A side menu will appear.
3. Click on “Exception Entry.”

2. The MSR screen will show you a list of MSRs for a calendar year.
  - a. **To continue entering data for an open MSR, click the “Select” link on the right-hand side.**
  - b. **To add a new MSR, click on the “Add New MSR” button in the lower right corner of the screen.**



## Continuing an open MSR

After you select an open MSR, INSTEP will display exceptions that have already been entered within the “Current Exceptions” section.

**INSTEP**

Home My Cases Hospital MSR LTF Forms My Email Person Search

Letters Resource Center Admin

Log Out

INDIANA STATE DEPARTMENT OF HEALTH

### Newborn Screening Exception Entry - August 2011

Use this form to report exceptions to the newborn screening heel stick process.

**Search for Child Record**  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Enter MRN

**Current Exceptions**  
There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

PID	Name	DOB	BO	Exception	MRN	Lab Data			
5137129	BEE, ZIPPY	08/01/2011	1	NICU	147	✕	<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">View the Chip</a>
5137131	BISON, CALF	08/02/2011	1	Religious Refusal	589	✕	<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">View the Chip</a>

Exceptions that have already been entered for this MSR

You may either enter a new exception (see section titled, “Entering New Exceptions”) or click “Edit” to edit an exception that was previously entered.

## Adding Children to MSR

To add a child to the MSR, **type in the child's Medical Record Number (MRN)** and click **“Search”** to look for a matching record within the INSTEP database.

**If (a) matching record(s) is/are identified**, INSTEP will display all possible matches. Click **“Select”** for the appropriate match.

**INSTEP** **NEWBORN**

Home My Cases Hospital MSR Dynamic Data My Email INDIANA STATE DEPARTMENT Previous Profiles

### SCREENING EXCEPTION ENTRY

USE THIS FORM TO REPORT EXCEPTIONS TO THE NEWBORN SCREENING HEEL STICK PROCESS.

[Search for Child Record](#)

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

12345

PID	#	Last Name	First Name	Middle Name	Sex	DOB	TOB	BO	Mother's Maiden
No records to display.									

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

PID	Name	DOB	BO	Exception	MRN	
4997169	SMITH, JOHN	20100301	1	Hospital Error	12345	<a href="#">Select</a> <a href="#">Remove</a>

Possible match for this MRN

**If there are no matches**, you will be automatically sent to the “Add a New Child” page.

## Entering / Editing Demographic Information for Child & Mother

When you select an existing child's record, the next INSTEP screen will give you the chance to edit and/or review the demographic information for a child and his/her mother.

**NOTE:** There are several pieces of demographic information that are helpful “behind the scenes” when attempting to match records within INSTEP. Useful data points are listed below. Points listed in **bold** are **required**:

- K-Number (the number in the lower right corner of the heelstick card)
- **Child's last name**
- Child's first name (if not known, leave this field blank and check the “Child's first name is unknown” box)
- Child's middle name
- Suffix(es) to child's last name (e.g., Jr., III)
- **Child's date of birth (DOB)**
- **Child's time of birth**
- **Child's sex (gender)**
- **Child's birth order**
- Mother's medical record number (MRN)
- **Mother's name (first & last)**
- Mother's maiden name
- Mother's DOB
- **Mother's address**
- **Mother's phone number**

These data points are extremely helpful in identifying accurate matches and preventing the creation of duplicate records. Please enter this information whenever possible!

If you are entering information for a **new** child on this MSR, please enter all available information. Items marked with a red exclamation point ( ! ) are required.

Add Child Details

Enter the child and mother demographic information to identify this exception.

Child Information

MRN:

13567962

Requisition Number:

Last Name:

!

First Name:

☐ Child's first name is unknown

Middle Name:

Suffix:

Date of Birth:

!

Time of Birth:

!

Sex:

!

Birth Order:

1

!

Mother Information

MRN:

Last Name:

!

First Name:

!

Maiden Name:

Date of Birth:

1/1/0001

Address:

IN

!

Phone:

!

**NOTE:** You must enter a telephone number for the child's mother in order to complete the exception.

**If you are viewing information for an existing child**, please review the demographic information. If you need to update any information, click the “Edit Person Information” link for the child or mother and make changes as necessary.

**NOTE:** There are several pieces of demographic information that are helpful “behind the scenes” when attempting to match records within INSTEP. Useful data points are listed below. Points listed in **bold** are **required**:

- K-Number (the number in the lower right corner of the heelstick card)
- **Child’s last name**
- Child’s first name (if not known, leave this field blank and check the “Child’s first name is unknown” box)
- Child’s middle name
- Suffix(es) to child’s last name (e.g., Jr., III)
- **Child’s date of birth (DOB)**
- **Child’s time of birth**
- **Child’s sex (gender)**
- **Child’s birth order**
- Mother’s medical record number (MRN)
- **Mother’s name (first & last)**
- Mother’s maiden name
- Mother’s DOB
- **Mother’s address**
- **Mother’s phone number**

These data points are extremely helpful in identifying accurate matches and preventing the creation of duplicate records. Please enter this information whenever possible!

[Verify Child Details](#)  
Verify the child's demographic information.

Child Information	
PID:	4997169
Name:	JOHN SMITH
Mother Maiden Name:	
Date of Birth:	3/1/2010
Date of Death:	
Gender:	Male
Birth Order:	1
<a href="#">Edit Person Information</a>	

Click here to edit the child's demographic information.

[Verify Mother Details](#)  
Verify the mother's demographic information. An address and phone number are required to complete the exception.

Mother Information	
PID:	4997168
Name:	JANE SMITH
Maiden Name:	
Mother Maiden Name:	
Date of Birth:	12/31/1979
Date of Death:	
Gender:	Female
Address(es):	123 MAIN STREET INDIANAPOLIS, IN 46220 County:
Phone Number:	(317) 555-0012
Email:	
<a href="#">Edit Person Information</a>	

Click here to edit the mother's demographic information.

## **Alternate method of editing/adding an address or phone number for the child's mother:**

Click the green “Show Others” button. The screen will expand to show you all available addresses or phone numbers associated with this child's mother. You will also be able to enter a new address or phone number. Click “Save” when complete.

**Mother Information**

PID: 4997201  
Name: MARY HIPPO  
Maiden Name: POTAMUS  
Mother Maiden Name:  
Date of Birth: 1/1/1980  
Date of Death:  
Gender: Female  
Address(es): 123 RIVER RD.  
AFRICA, IN 46254  
County:

To enter a new address for the child's mother, click the green “Show Others” arrow.

↑ (Click to hide)

**Addresses Recorded**

1 123 RIVER RD.  
AFRICA, IN 46254  
County:  
Source: INSTEP  
Last Update: 4/22/2010

**Add Address**

Address:   
City:   
State:   
Zip:

Enter the address and click “Save.”

PID: 4997201  
Name: MARY HIPPO  
Maiden Name: POTAMUS  
Mother Maiden Name:  
Date of Birth: 1/1/1980  
Date of Death:  
Gender: Female  
Address(es): 123 RIVER RD.  
AFRICA, IN 46254  
County:

Phone Number: No Saved Phones

Click here to enter a telephone number for the child's mother.

↓ (Show Others)  
↑ (Click to hide)

**Phones Recorded**

**Add Person Phone**

Number: (317) 123-4567  
Type: Home  
☐ Make this the primary number

Enter the mother's phone number, select the type of phone number, and click “Save.”

### **When entering dates:**

- Type the requested date into the text box in a MMDDYYYY format. You do not need to enter hyphens ( - ) or slashes ( / ) between numbers.

**OR**

- Open a “calendar pop-up” by clicking on the calendar icon near the date field. This “pop-up” will allow you to scroll through the calendar year and select a date by clicking on it.

[Add Child Details](#)  
Enter the child and mother demographic information to identify this exception.

**Child Information**

MRN:

Last Name:  ! First Name:  ☐ Child's first name is unknown

Date of Birth:  ! Time of Birth:

Sex:  April 2010 Order:  !

**Mother Information**

MRN:


Last Name:

Maiden Name:

Name:  !

of Birth:

	S	M	T	W	T	F	S
14	28	29	30	31	1	2	3
15	4	5	6	7	8	9	10
16	11	12	13	14	15	16	17
17	18	19	20	21	22	23	24
18	25	26	27	28	29	30	1
19	2	3	4	5	6	7	8



## **Selecting a Physician From “Frequently Used Provider” List**

After you have entered demographic information for the child and the child’s mother, the next section of the Exception Entry screen will allow you to enter information for the child’s primary care provider.

### **Notes about Provider Entry in INSTEP**

- INSTEP will allow you to “associate” (or list) more than one physician for each child you enter as an exception. However, you may only designate ONE associated physician as the child’s primary care provider (PCP).
- PCPs are labeled in INSTEP with a red heart.
- Other associated physicians (not the child’s PCP) are labeled in INSTEP with a gray heart.
- INSTEP has a feature called the “Frequently Used Provider” list, which saves the 10 providers you most recently added so you don’t have to search for physicians multiple times.



### **“Frequently Used Provider” feature**

INSTEP has a “Frequently Used Provider” feature that will keep & display the names and addresses of the 10 providers you most recently used.

**In order to associate a provider on your “Frequently Used Provider” list with the current exception you’re entering:**

1. Click on the “Frequently Used Provider” drop-down menu.
2. Click on the name of the PCP that you wish to associate with this exception.
3. Click the “Add” button.

Associated Providers

Name	Address	City	State	Zip
No providers have been associated with this child yet.				

Select a Frequently Used Provider

Select a Frequently Used Provider

CHARPENTIER, KRISTIN

CHEESMAN, DAVID

To choose a provider from your Frequently Used Provider list:

1. Click on the “Frequently Used Provider” drop-down menu.
2. Select the name of the PCP you wish to associate.
3. Click the “Add” button.

INSTEP will now display the physician’s name and contact information within the “Associated Providers” box. ***To designate this provider as the child’s PCP, click on the gray heart icon. The icon will turn red, indicating that the provider is the child’s PCP.***

Associated Providers

Name	Address	City	State	Zip	Phone #	Ext	PCP?
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171		

INSTEP will refresh and display the provider’s information within the “Associated Providers” box.

To designate a physician as the child’s PCP, click on the gray heart icon. The heart will turn red.

A red heart indicates that a provider is the child’s PCP.

Associated Providers

Name	Address	City	State	Zip	Phone #	Ext	PCP?
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171		

Continue to follow these instructions to add additional physicians from your “Frequently Used Providers” list to this child’s exception.

## **Searching for & Associating a Provider Not in “Frequently Used Provider” List**

If the physician caring for this child is not already in your “Frequently Used Provider” list, you will need to search for him/her within INSTEP before you can add him/her as an associated provider for the child.

### **Notes about Provider Entry in INSTEP**

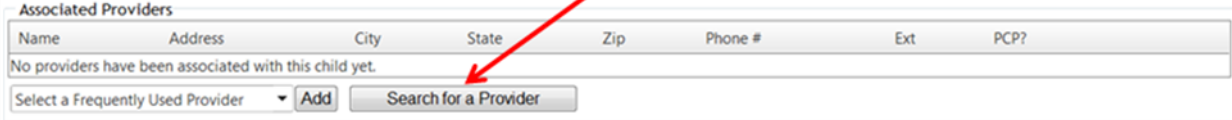
- You can search for a provider using “partial” searches—for example, if you’re searching for David Smith, you can type “Smith,” “Smit,” “Smi,” “Sm,” or “S” into the “Last Name” search box. Partial searches can also be used in the “First Name” box.
- Remember, INSTEP will allow you to “associate” (or list) more than one physician for each child you enter as an exception. However, you may only designate ONE associated physician as the child’s primary care provider.
- PCPs are labeled in INSTEP with a red heart. Other associated physicians (not the child’s PCP) are labeled in INSTEP with a gray heart.
- INSTEP will save each physician you add within your “Frequently Used Provider” list, so you won’t have to search for physicians multiple times. See the previous section for more details on the “Frequently Used Provider” feature.

**To associate a provider that is NOT in your “Frequently Used Provider” list to a child’s exception:**

1. Click the “Search for a Provider” button.

Currently, there are no providers associated with this child's exception.

To associate a provider that is NOT found in your "Frequently Used Providers" list, click the "Search for a Provider" button.



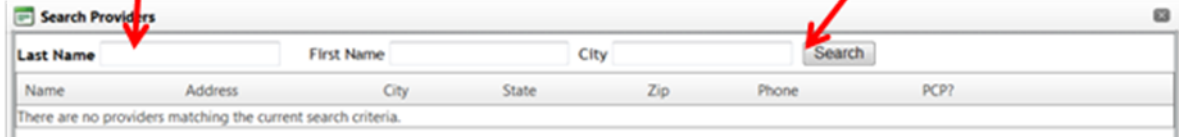
Name	Address	City	State	Zip	Phone #	Ext	PCP?
No providers have been associated with this child yet.							

Select a Frequently Used Provider

2. INSTEP will display a search window. Enter the physician’s last name (*entering the first name and/or city is optional*) and click “Search.”

Within the "Search Providers" box, enter the physician's last name. Click "Search."

**NOTE:** First name & city are optional. However, entering this data will help limit duplicated listings within your search results.

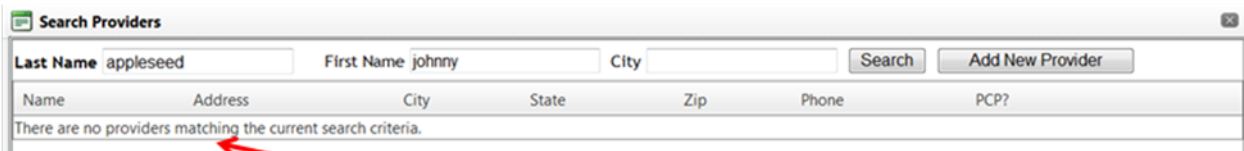


Name	Address	City	State	Zip	Phone	PCP?
There are no providers matching the current search criteria.						

- **NOTE:** You can search for a provider using “partial” searches—for example, if you’re searching for David Smith, you can type “Smith,” “Smit,” “Smi,” “Sm,” or “S” into the “Last Name” search box. Partial searches can also be used in the “First Name” box.

3. INSTEP will display a list of all possible matches based on the name you entered.
  - a. **If no match is found**, INSTEP will display a message below the search boxes that states, “There are no providers matching the current search criteria.”
    - Check the spelling of the name to try again.
    - Try searching for the provider using his/her last name and the first LETTER of his/her first name.
    - Try searching for the provider using the first letter of his/her last name ONLY.

If you still cannot find a match, please skip to the section below titled, “Adding a Brand-New Provider to INSTEP.”



Search Providers

Last Name: appleseed First Name: johnny City: Search Add New Provider

Name	Address	City	State	Zip	Phone	PCP?
There are no providers matching the current search criteria.						

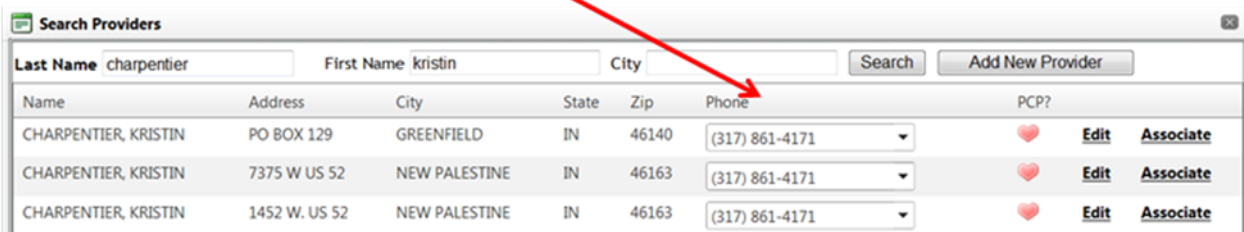
If a match cannot be found, INSTEP will display this message.

Check your spelling of the provider's name(s) & try to search again. Alternatively, you can search using a partial first/last name.

- b. **If a match is found**, INSTEP will display a grid that shows all the available results.
  - If a physician has multiple addresses, each address will display on a separate line.
  - If a physician has multiple phone numbers, they will appear in the drop-down box in the “Phone” column.

This physician has multiple address listings within INSTEP. Each address will show up in a separate line of the table.

If a provider has multiple phone numbers, the numbers will all be listed within the drop-down box in the “Phone” column.



Search Providers

Last Name: charpentier First Name: kristin City: Search Add New Provider

Name	Address	City	State	Zip	Phone	PCP?
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171	♥ Edit Associate
CHARPENTIER, KRISTIN	7375 W US 52	NEW PALESTINE	IN	46163	(317) 861-4171	♥ Edit Associate
CHARPENTIER, KRISTIN	1452 W. US 52	NEW PALESTINE	IN	46163	(317) 861-4171	♥ Edit Associate

- c. Identify the address you wish to have associated with this provider's listing in INSTEP.
- d. **Within the address line you wish to associate**, click on the "Phone" drop-down menu. Click on the phone number you wish to have associated with this provider's listing.
- e. If this provider is the child's PCP, click on the gray heart in the "PCP?" column. The heart will turn red, indicating that this provider is the child's primary care provider.
- f. Click the "Associate" link **within the address line you wish to associate**.

In this example, the 2<sup>nd</sup> address line is the address that will be associated in INSTEP.

1. To choose the correct phone number, click on the "Phone" drop-down menu within the line of the address you wish to associate with the child.

- Click on the phone number you wish to associate with this provider.

The screenshot shows a web interface titled "Search Providers". It has search filters for "Last Name" (charpentier), "First Name" (kristin), and "City". Below the filters is a table with columns: Name, Address, City, State, Zip, Phone, PCP?, Edit, and Associate. There are three rows of data for CHARPENTIER, KRISTIN. The second row is highlighted. A red arrow points to the "Phone" dropdown menu in the second row, which is open and shows options: (317) 861-4171, (317) 891-6652, (317) 861-4171, (317) 891-6652, and New. Another red arrow points to the gray heart icon in the "PCP?" column for the second row. A third red arrow points to the "Associate" link in the "Associate" column for the second row.

Name	Address	City	State	Zip	Phone	PCP?	Edit	Associate
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171		Edit	Associate
CHARPENTIER, KRISTIN	7375 W US 52	NEW PALESTINE	IN	46163	(317) 891-6652		Edit	Associate
CHARPENTIER, KRISTIN	1452 W. US 52	NEW PALESTINE	IN	46163	(317) 861-4171		Edit	Associate

2. If this provider is the child's PCP, click on the gray heart in the "PCP?" column.
  - The heart will turn red, indicating that this provider has been designated as the child's PCP.
3. When you have identified the PCP address & selected the PCP phone number, click the "Associate" link within the correct address line.

In this example, the user should click the "Associate" link in the 2<sup>nd</sup> address line.

## Editing Provider Contact Information

INSTEP allows users to edit/update existing addresses & phone numbers for providers.

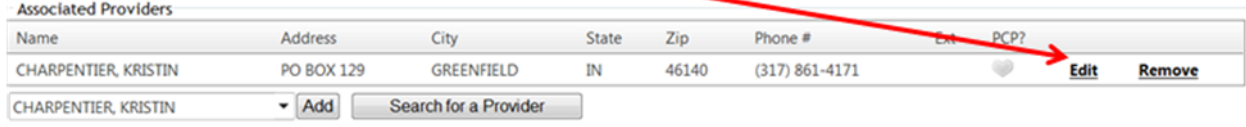
**NOTE:** INSTEP users should be cautious when editing an address or phone number—any changes you make will affect everyone that uses INSTEP!

*If you don't see the address you need for your provider, don't edit. Instead, add a new address! See step 5 below for more details.*

To edit an existing office address or phone number of a provider:

1. Click on the “Edit” link within the provider’s information. You can edit information for a provider that is already associated with a child or within your provider search results.

To edit the address or phone number for a provider, click on the "Edit" link.



The screenshot shows a table titled 'Associated Providers' with columns: Name, Address, City, State, Zip, Phone #, Ext, and PCP?. The first row lists 'CHARPENTIER, KRISTIN' with address 'PO BOX 129', city 'GREENFIELD', state 'IN', zip '46140', and phone '(317) 861-4171'. There is a heart icon in the 'PCP?' column. Below the table are a dropdown menu with 'CHARPENTIER, KRISTIN', an 'Add' button, and a 'Search for a Provider' button. A red arrow points from the text above to the 'Edit' link in the table row.

Name	Address	City	State	Zip	Phone #	Ext	PCP?
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171		♥

CHARPENTIER, KRISTIN ▼ Add Search for a Provider

2. INSTEP will refresh & display text boxes that you can use to edit/update the provider’s address & phone number as needed.

*Remember, if you don't see the address you need for a provider, don't edit! Instead, add a new address or phone number. See step 5 below for more details.*

3. Update the provider's address and/or phone number as needed.
4. When you have finished editing the provider's contact information, click the "Update Provider" button.

INSTEP will refresh & display text boxes that you can use to edit/update an address or phone number.

When finished updating the provider's contact information, click the "Update Provider" button.

Associated Providers

Name	Address	City	State	Zip	Phone #	Ext	PCP?	
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171			<a href="#">Edit</a> <a href="#">Remove</a>

If you have updated contact information for CHARPENTIER, KRISTIN you can enter it here.  
You can also [add a brand-new address](#) if needed.

Address

City  State  Zip

Phone   Ext

5. If you do not see the address you need for a provider, click on the "Add a brand-new address" link above the text boxes.

To enter a brand-new address for a provider, click the "add a brand-new address" link above the text boxes.

Associated Providers

Name	Address	City	State	Zip	Phone #	Ext	PCP?	
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171			<a href="#">Edit</a> <a href="#">Remove</a>

If you have updated contact information for CHARPENTIER, KRISTIN you can enter it here.  
You can also [add a brand-new address](#) if needed.

Address

City  State  Zip

Phone   Ext

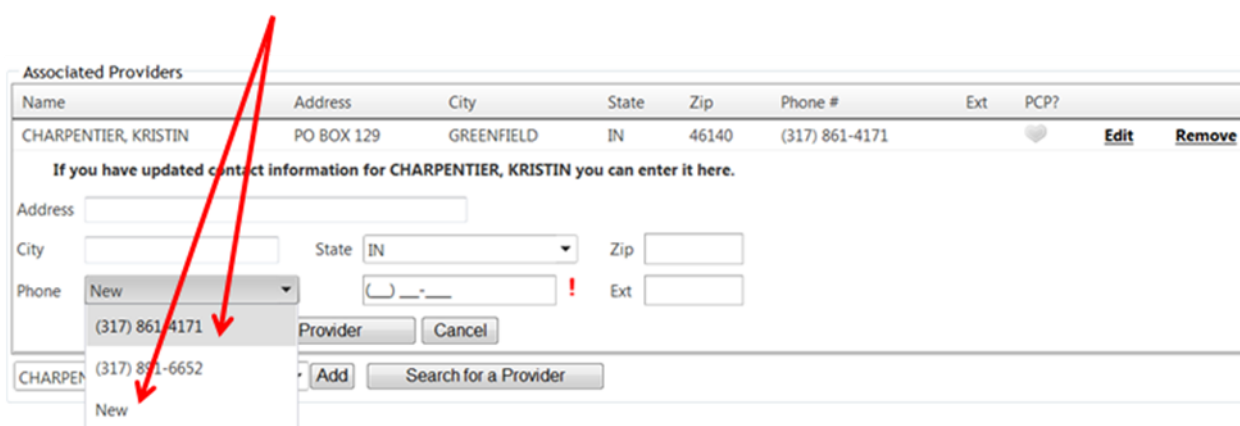
6. INSTEP will refresh & display blank text boxes. Type in the new address information.
7. To select a phone number for the new address, you can either:
  - a. Select an existing phone number from the “Phone” drop-down menu
  - OR
  - b. Select “NEW” from the “Phone” drop-down menu and type in the new phone number.

INSTEP will refresh & display the address/phone number fields.

Enter the new provider address.

To select a phone number for the new provider address, you can either:

- Select an existing phone number from the “Phone” drop-down menu
- OR
- Select “NEW” from the “Phone” drop-down menu & type in a new phone number.



**Associated Providers**

Name	Address	City	State	Zip	Phone #	Ext	PCP?	
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171			<a href="#">Edit</a> <a href="#">Remove</a>

If you have updated contact information for CHARPENTIER, KRISTIN you can enter it here.

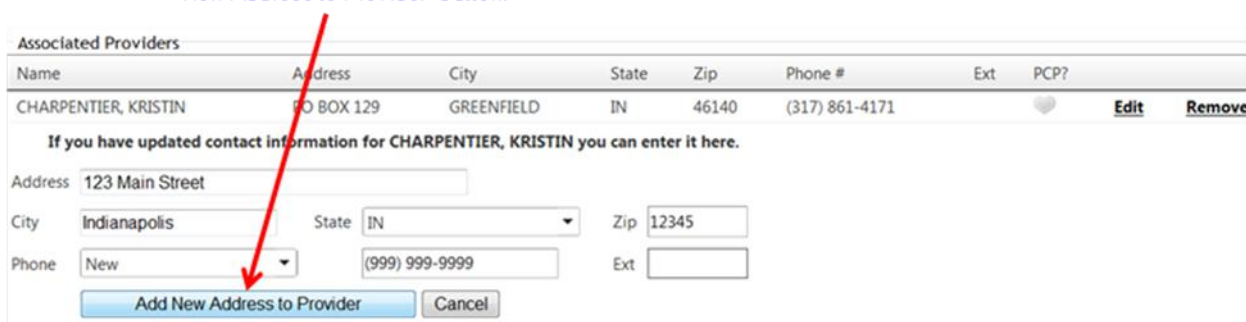
Address

City  State  Zip

Phone    Ext

8. When you are finished with this new address & its phone number, click the “Add New Address to Provider” button.

When you are finished entering the new address and/or phone number, click the “Add New Address to Provider” button.



**Associated Providers**

Name	Address	City	State	Zip	Phone #	Ext	PCP?	
CHARPENTIER, KRISTIN	PO BOX 129	GREENFIELD	IN	46140	(317) 861-4171			<a href="#">Edit</a> <a href="#">Remove</a>

If you have updated contact information for CHARPENTIER, KRISTIN you can enter it here.

Address

City  State  Zip

Phone   Ext



9. INSTEP will refresh & display the new address in the “Associated Providers” box.
10. If this provider is the child’s PCP, click on the gray heart in the “PCP?” column. The heart will turn red, indicating that this provider is the child’s PCP.

INSTEP will refresh & display the new address within the "Associated Providers" box.

If this provider is the child's primary care provider, click on the heart in the "PCP?" column. The heart will turn red, indicating that this provider is the child's PCP.



Name	Address	City	State	Zip	Phone #	Ext	PCP?	
CHARPENTIER, KRISTIN	123 MAIN STREET	INDIANAPOLIS	IN	12345	(999) 999-9999			<a href="#">Edit</a> <a href="#">Remove</a>

Select a Frequently Used Provider

## Adding a New Provider to INSTEP

If you have searched for a provider and cannot find a record of him/her in INSTEP, you can add him/her to the system.

**NOTE:** Users *must* search for a provider before they are allowed to add a new provider to INSTEP. This is in place to avoid having multiple duplicated listings for the same provider.

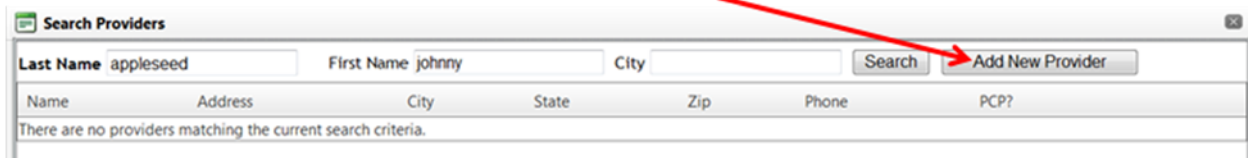
To add a brand-new provider to INSTEP

1. Click the “Add New Provider” button within the search fields.

If you searched for a provider and could not find him/her, you can add him/her to INSTEP.

**NOTE:** You *must* search for a provider before you can add a new provider to INSTEP. This is to prevent duplicated physician listings within the system.

To add a new provider to INSTEP, click the “Add New Provider” button.



Name	Address	City	State	Zip	Phone	PCP?
There are no providers matching the current search criteria.						

2. INSTEP will refresh & display text boxes you can use to enter the provider's information.

**NOTE:** When entering information for a brand-new provider, ***you must include the provider's address & phone number.***

Optional fields include the following:

- Provider's middle initial
- Provider's license number

While these fields are optional, entering this information will help INSTEP create a complete & accurate record for this provider. ***If you have this information, please take the time to enter it!***

3. When you are finished entering the provider's information, click the "Save New Provider" button.

Enter the provider's address & phone number.

**NOTE:** If you have the provider's middle initial and/or license number, please enter this information as well. Having this information helps INSTEP avoid duplicate listings for physicians.

When you have entered the provider's information, click the "Save New Provider" button.

The screenshot shows a web form titled "Search Providers". At the top, there are input fields for "Last Name" (appleseed), "First Name" (johnny), and "City", followed by a "Search" button. Below this is a table with columns: Name, Address, City, State, Zip, Phone, and PCP?. The table contains one row with the following data: Last: appleseed, First: johnny, Middle: (empty), License Number: 37125498A, Address: 123 Apple Tree Lane, City: Appleville, State: IN (dropdown), Zip: 99999, Phone: New (dropdown), (999) 999-9999, Ext: 123. At the bottom of the form are two buttons: "Save New Provider" and "Cancel". A red arrow points from the text above to the "Save New Provider" button.

4. INSTEP will refresh & display the provider's information within the "Search Provider" box.
  - a. If this provider is the child's PCP, click on the gray heart in the "PCP?" column. The heart will turn red, indicating that this provider is the child's primary care provider.
5. Click the "Associate" link.

The screenshot shows a web application window titled "Search Providers". It has search filters for "Last Name" (appleseed), "First Name" (johnny), and "City". Below the filters is a table with the following columns: Name, Address, City, State, Zip, Phone, PCP?, Edit, and Associate. The table contains one row for "APPLESEED, JOHNNY" with address "123 APPLE TREE LANE", city "APPLEVILLE", state "IN", zip "99999", and phone "(999) 999-9999 Ext 123". In the "PCP?" column, there is a gray heart icon. In the "Associate" column, there is a link labeled "Associate". Two red arrows originate from the text below: one points to the heart icon, and the other points to the "Associate" link.

Name	Address	City	State	Zip	Phone	PCP?	Edit	Associate
APPLESEED, JOHNNY	123 APPLE TREE LANE	APPLEVILLE	IN	99999	(999) 999-9999 Ext 123		<a href="#">Edit</a>	<a href="#">Associate</a>

INSTEP will refresh & display the provider's information within the "Search Providers" box.

If this provider is the patient's primary care provider (PCP), click the heart in the "PCP?" column. The gray heart will change to red. Remember, a red heart indicates a PCP in INSTEP.

Click the "Associate" link to associate this provider with the child.

## Entering Exception Codes (Exception Entry)

The final section of the INSTEP Exception Entry screen is where you enter the actual exception information for this child. You will need to complete all of the following items to submit an exception:

1. **Transfer detail** – This section will allow you to enter “Transferred Out” or “Transferred In” information. The default setting for this box is “Not Transferred”.
  - a. **If a child was not transferred in/out**, leave the selection as “Not Transferred” and go to step 2.
  - b. **If a child was transferred out of your facility before he/she received a valid pulse oximetry screen**, select “Transferred Out” from the drop-down menu and then select the name of the facility where the child was transferred.

**NOTE:** You do NOT need to include children who were transferred to another facility **after receiving a valid pulse oximetry screen**. Once a child has had a valid pulse oximetry screen, you do not need to report any additional transfers for him/her.

The screenshot shows the 'Enter Exception Details' form. The 'Transfer Detail' dropdown is set to 'Transferred Out'. The 'Organization name' dropdown is open, showing a list of facilities. A red arrow points to the 'Transferred Out' dropdown with the text 'Select "Transferred Out"'. A red bracket points to the list of facilities with the text 'Select the name of the facility where the child was transferred.'.

Enter Exception Details

Transfer Detail: Transferred Out

Organization name: Select an organization

Exception Type: Select an organization

Date: Clark Street Hospital

Notes: General Hospital

Indiana State Department Of Health

Indiana State Department Of Health

Indiana State Department Of Health

Indiana State Department Of Health

Indiana State Department Of Health

Mcnamara-Troy Clinic

Oceanside Wellness Centre

Princeton-Plainsboro Teaching Hospital

<< Back Save Ex

Select "Transferred Out"

Select the name of the facility where the child was transferred.

- c. If a child was transferred into your facility before he/she received a valid pulse oximetry screen, select “Transferred In” from the drop-down menu and then select the name of the facility that transferred the child to your facility.

**NOTE:** Again, you do NOT need to include children who were transferred to your facility after receiving a valid pulse oximetry screen. Once a child has received a valid pulse oximetry screen, you do not need to report him/her as an exception.

The screenshot shows the 'Enter Exception Details' form. The 'Transfer Detail' dropdown is set to 'Transferred In'. The 'Organization name' dropdown is open, showing a list of facilities including 'Clark Street Hospital', 'General Hospital', 'Indiana State Department Of Health' (multiple entries), 'Mcnamara-Troy Clinic', 'Oceanside Wellness Centre', 'Princeton-Plainsboro Teaching Hospital', and 'Sacred Heart Hospital'. A red arrow points to the 'Transferred In' dropdown with the text 'Select “Transferred In”'. A red bracket points to the organization list with the text 'Select the name of the facility that transferred the child to your facility.'.

Enter Exception Details

Transfer Detail: Transferred In

Organization name: Clark Street Hospital

Exception Type: Clark Street Hospital

Date: General Hospital

Notes: Indiana State Department Of Health

Indiana State Department Of Health

Indiana State Department Of Health

Indiana State Department Of Health

Indiana State Department Of Health

Mcnamara-Troy Clinic

Oceanside Wellness Centre

Princeton-Plainsboro Teaching Hospital

Sacred Heart Hospital

<< Back Save Ex

Select “Transferred In”

Select the name of the facility that transferred the child to your facility.

2. **Exception Type** – This section allows you to enter the appropriate exception code for this child. **You must select an exception code for every child on your Pulse Oximetry MSR.** Descriptions of each exception code follow the diagram below.

The screenshot shows a web form titled "Enter Exception Details". It contains two main input fields: "Transfer Detail:" and "Exception Type:". The "Transfer Detail:" field is a text box with the placeholder text "-- Referred For Additional Follow-Up". The "Exception Type:" field is a dropdown menu. A red bracket on the right side of the dropdown menu points to the list of options, with the text "Select the appropriate exception code for this child." written next to it. The list of options in the dropdown menu is as follows:

- Transfer Only
- Finally Screened
- NICU
- Initial Screen Next Month
- Deceased
- Religious Refusal
- Discharged HOME Without Pulse Oximetry Screen
- Prenatally/Postnatally Diagnosed with CCHD
- Did Not Pass Pulse Oximetry Screen

a. **Transfer only** (code 1)

This code is for children who were transferred out of your facility before receiving a valid pulse oximetry screen.

***If you select this exception code, enter the date the child was transferred out of your facility in the “Date” box.***

b. **Finally screened** (code 2)

This code is for children who were:

- Transferred into your facility & received a valid pulse oximetry screen before you submitted your MSR

**OR**

- Children who were “holdovers” from the previous month’s MSR and received a newborn screen during this calendar month.
  - There are three “holdover” exception codes, including the following: “NICU,” “Initial screen next month,” or “Discharged HOME without pulse oximetry screen.”

*If you select this exception code, enter the date the child received his/her pulse oximetry screen in the “Date” box.*

c. **NICU** (code 3)

This code is for a child who did not receive his/her pulse oximetry screen because he/she is in the NICU. Children with the “NICU” exception code are considered “holdovers” and will need to be updated next month. **See the Pulse Oximetry MSR FAQs for more information on how to update “holdovers.”**

**NOTE:** If your facility does not have a NICU, you should NOT use this exception code!

d. **Initial screen next month** (code 4)

This code is for children who were born at the end of a calendar month and **were not old enough to receive a valid pulse oximetry screen before your MSR is submitted.**

If a child is born at the end of the calendar month, **but receives a valid pulse oximetry screen before you submit your MSR,** you do NOT need to report the child on your Pulse Oximetry MSR.

Children with the “Initial screen next month” exception code are considered “holdovers” and will need to be included on your next MSR (typically, these children will be reported as “Finally Screened” exceptions the following month). **See the Pulse Oximetry MSR FAQs for more information on how to update “holdovers.”**



e. **Deceased** (code 5)

This child did not receive a pulse oximetry screen because he/she died before he/she was old enough to receive a valid pulse oximetry screen.

*If you select this exception code, enter the child's date of death in the "Date" box.*

f. **Religious Refusal** (code 6)

Children with this exception code did not receive a valid pulse oximetry screen because their parents/legal guardians completed & signed a Religious Waiver declining the screen.

*If you select this exception code, enter the date the child's parent/guardian signed the Religious Waiver in the "Date" box.*

**NOTE:** If you cannot scan & upload the Religious Waiver into INSTEP, be sure to send a copy of the completed, signed Religious Waiver to the ISDH Newborn Screening Program via fax (317-234-2995) with your completed MSR.

**NOTE:** Indiana's newborn screening law states that parents/legal guardians may ONLY refuse newborn screening (including heelstick, pulse oximetry, and hearing screening) based on the parents'/legal guardians' religious beliefs.

The ISDH Newborn Screening Program has asked all birthing facilities to review the form your facility currently uses if parents refuse newborn screening. If this form does not clearly indicate that the parents/legal guardians are refusing based on their religious beliefs (for example, a generic "Refusal of Newborn Care" form), this form will no longer be accepted by the ISDH Newborn Screening Program.

A copy of the state Religious Waiver form can be found on the ISDH Newborn Screening Professionals' website at <http://www.in.gov/isdh/20381.htm>. Alternatively, your facility may develop its own religious refusal form for newborn screening—but the form must clearly indicate that parents/legal guardians are objecting to part/all of the newborn screening based on their religious beliefs and not for any other reason.

If you have any questions about your facility's religious refusal form, please contact ISDH.

If you select this exception code, please perform the following actions:

- Enter the date the Religious Waiver was completed in the “Date” box.**
- NOTE: INSTEP users can upload and attach a digital copy of the signed Religious Waiver.** To do this, please scan the Religious Waiver into a PDF, Microsoft Word, Microsoft Excel, or image file format. *Accepted file types include the following: pdf, tiff, bmp, gif, png, doc, xls, docx, xlsx, xps, jpg, jpeg.*
- Click “Browse” to select the appropriate file to upload. After selecting the appropriate file, click “Open.”**

Enter Exception Details

Transfer Detail:

Exception Type:  !

Date:  !

Upload a Religious Waiver:

**ATTACHED FILES**

Upload an file:

Files:  
0 file(s) found.

Notes:

Click “Browse” to select the appropriate scanned Religious Waiver from your computer.

Enter the date that the child’s parents completed & signed the Religious Waiver.

INSTEP - Windows Internet Explorer

Choose File to Upload

Look in:

File name:

Files of type:

Files:  
0 file(s) found.

Notes:

Select the appropriate file to upload. Click “Open.”

PROCESS.

- d. Click “Upload” to upload the scanned Religious Waiver for this child.

The screenshot shows the 'Enter Exception Details' form. The 'Transfer Detail' dropdown is set to 'Not Transferred'. The 'Exception Type' dropdown is set to 'Religious Refusal' with a red exclamation mark icon. The 'Date' field is empty with a calendar icon and a red exclamation mark icon. The 'Upload a Religious Waiver:' section has a dark red header 'ATTACHED FILES'. Below it, the 'Upload an file:' section shows a text box with 'h:\NBS\Religious Waiver 2010.pdf', a 'Browse...' button, and an 'Upload' button. A red arrow points to the 'Upload' button. Below this, the 'Files:' section shows '0 file(s) found.'. The 'Notes:' section is a large empty text box. A blue text box with the text 'Click “Upload” to upload the file to INSTEP.' is overlaid on the right side of the form.

- e. The screen will refresh and say, “Attachment uploaded successfully.” Repeat these steps if you need to attach additional files for this child. When you have uploaded all files, go to step 3.

**NOTE:** Once you upload a file, you must save the exception in order for INSTEP to display the names of the file(s) you have uploaded.

The screenshot shows the 'Enter Exception Details' form after a successful upload. The 'Transfer Detail' dropdown is set to 'Not Transferred'. The 'Exception Type' dropdown is set to 'Religious Refusal' with a red exclamation mark icon. The 'Date' field is empty with a calendar icon and a red exclamation mark icon. The 'Upload a Religious Waiver:' section has a dark red header 'ATTACHED FILES'. Below it, the 'Upload an file:' section shows a text box with 'Attachment uploaded successfully.', a 'Browse...' button, and an 'Upload' button. A red arrow points to the 'Attachment uploaded successfully.' text. Below this, the 'Files:' section shows '0 file(s) found.'. The 'Notes:' section is a large empty text box. A blue text box with the text 'Success!' is overlaid on the right side of the form.

g. **Discharged HOME without pulse oximetry screen** (code 7)

This exception code is for children who did not receive a valid pulse oximetry screen before he/she was discharged home. This does **NOT** include children who are discharged from your facility to be transferred to another birthing facility (e.g., to be transferred to the NICU at a nearby hospital).

*If you select this exception code, enter the date that the child was discharged home in the “Date” box.*

**NOTE:** Any child who is discharged HOME from your facility without receiving a valid pulse oximetry screen *must be immediately reported by phone to the INSTEP Director (317-233-9260)!*

h. **Prenatally/postnatally diagnosed with CCHD** (code 8)

This exception code is for children who will not receive pulse oximetry screening because they were prenatally or postnatally (prior to 24 hours of age) diagnosed with critical congenital heart disease (CCHD, also called critical congenital heart defects). These are infants who were prenatally/postnatally diagnosed with at least one of the following heart defects:

- Hypoplastic left heart syndrome (HLHS)
- Pulmonary atresia
- Tetralogy of Fallot (TOF)
- Total anomalous pulmonary venous return (TAPVR)
- Transposition of the great arteries (TGA)
- Tricuspid atresia
- Truncus arteriosus

**i. Did not pass pulse oximetry screen – referred for additional follow-up**  
(code 9)

This exception code is for children who do not pass the pulse oximetry screen (as defined in Indiana’s pulse oximetry screening protocols) &, therefore, need to be referred to a pediatric cardiologist for additional follow-up. **Do NOT report these children with the “Transferred Out” transfer code. Transfer codes are only for children who left your facility without receiving a valid pulse oximetry screen.**

***Please verify these children’s pulse oximetry results before you enter him/her on your MSR.*** Children who do not pass the pulse oximetry screen should have one of the following types of results:

- Child had three (3) consecutive pulse oximetry screens where his/her readings were < 95% in BOTH the right hand & foot
- Child had three (3) consecutive pulse oximetry screens where his/her readings showed a difference of > 3% between the right hand & foot
- Child had one (1) pulse oximetry reading that was < 90% saturation (in either hand or foot)

***If you select this option, enter the name of the facility to which this child was referred for additional follow-up (including echocardiogram) in the “Where will this child receive his/her follow-up care?” box.***

3. **Notes** – This section will allow you to enter detailed comments pertaining to this child's exception(s). Examples: "Called child's PCP on 3/1/11 to alert office that this child still needs a pulse oximetry screen. PCP stated that child has appointment tomorrow; PCP will screen at this appointment."

Enter Exception Details

Transfer Detail: Not Transferred

Exception Type: Initial Screen Next Month !

Notes: Child born on 3/31. Will receive initial screen next month.

Enter notes for this child here.

<< Back Save Exception

When you have completed all sections, click "Save Exception" to save this child's information and return to the MSR screen. If your exception was saved, you will see the child's name appear in the "Current Exceptions" section. You will also see the blue "success" banner at the top of your INSTEP screen. Repeat the steps above for all children on this month's MSR.

Successfully added exception.

Repeat steps for remaining children on MSR.

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Exception saved successfully!

**Newborn Screening Exception Entry - August 2011**

Use this form to report exceptions to the newborn screening heel stick process.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Enter MRN Search

Current Exceptions

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

PID	Name	DOB	BO	Exception	MRN	Lab Data		Edit	Remove	View the Chip
5137129	BEE, ZIPPY	08/01/2011	1	NICU	147					
5137131	BISON, CALF	08/02/2011	1	Religious Refusal	589					

<< Back

## Automatic Population of Transfer Information

INSTEP has the capability to “pre-populate” or “automatically” populate transfer information for birthing facilities who receive children who are transferred from another facility.

**NOTE:** All MSR users *must* use INSTEP throughout the month in order for this feature to work. If all users submit their MSRs on the 14<sup>th</sup> of the following month, this feature will not function correctly—users at the receiving facilities will not have any transfers pre-populated. *As a reminder, please report all exceptions within 5 days of the child’s birth or within 5 days of the exception.*

### Example:

1. Parkview Hospital reports a child as being transferred to Adams Memorial Hospital on the August 2011 MSR.

Child is reported as  
"Transferred Out" to  
Adams Memorial Hospital

Enter Exception Details

Transfer Detail:

Transferred Out

!

Organization name:

Adams Memorial Hospital

!

Exception Type:

Transfer Only

!

Date:

8/4/2011

!

Notes:

<< Back

Reset Fields

Save Exception

View Chip

☐ Save and go to MSR Summary entry

- Adams Memorial's MSR user logs into INSTEP to complete his/her August 2011 MSR. INSTEP will "pre-populate" the MSR with any children who have been reported as transferred to that facility. ***Children who are reported as transferred to your facility will be highlighted in blue on your MSR. These children will appear in the "Unresolved Holdovers" section of your Exception Entry list.***

Children highlighted in blue in the "Unresolved Holdovers" section are children who have been reported as being transferred to your facility.

Use this form to report exceptions to the newborn screening heel stick process.

Search for Child Record  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Enter MRN

**Unresolved Holdovers**  
There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

PID	ID	Name	DOB	BO	Exception	MRN	Lab Data	Accept	Decline
5137107	1139	AARDVARK, CUB	08/01/2011	1	Transfer Only	789456	✓	Accept	Decline
5137109	1140	ANT, PUPA	08/02/2011	1	Transfer Only	234567	✓	Accept	Decline
5137111	1141	ANTELOPE, CALF	08/03/2011	1	Transfer Only	789451	✗	Accept	Decline
5137119	1146	CAT, SABLE	08/04/2011	2	Transfer Only	14328	✗	Accept	Decline

- If you hover over the "Accept" link, INSTEP will display a small pop-up that will tell you which facility reported the child as being transferred to your facility.

Use this form to report exceptions to the newborn screening heel stick process.

Search for Child Record  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Enter MRN

**Unresolved Holdovers**  
There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

PID	ID	Name	DOB	BO	Exception	MRN	Lab Data	Accept	Decline
5137107	1139	AARDVARK, CUB	08/01/2011	1	Transfer Only	789456	✓	Accept	Decline
5137109	1140	ANT, PUPA	08/02/2011	1	Transfer Only	234567	✓	Accept	Decline
5137111	1141	ANTELOPE, CALF	08/03/2011	1	Transfer Only	789451	✗	Accept	Decline
5137119	1146	CAT, SABLE	08/04/2011	2	Transfer Only	14328	✗	Accept	Decline

Hold your mouse over the "Accept" link to see which facility reported this child as being transferred to your facility.

Incoming transfer from Parkview Hospital



4. Users have two options:

- a. **Accept:** If the child has been transferred to your facility, click “Accept.” INSTEP will take you to the Exception Entry screen.
  - i. INSTEP will pre-populate the transfer code as “Transferred In” & automatically complete the “Organization Name” field with your facility’s name.
  - ii. Enter your facility’s MRN for the child.
  - iii. Update the “Exception Type” as needed. For example, if the child has received his/her pulse oximetry screen, you will select “Finally Screened.”
  - iv. Enter a date (e.g., date of pulse oximetry screen) if applicable.
  - v. Click “Save Exception” when finished.
  - vi. Repeat these steps for any additional transfers you are accepting.

The screenshot shows the 'Enter Exception Details' form. Red arrows point from blue annotations to specific fields and buttons:

- An arrow points from 'Enter your facility's MRN for this child.' to the 'Your facility's MRN for this child:' text input field.
- An arrow points from 'Update the Exception Type & Date fields as needed.' to the 'Exception Type:' dropdown menu.
- Another arrow points from the same annotation to the 'Date:' date picker field.
- An arrow points from 'INSTEP automatically completes the "Transfer Detail" as "Transferred In" & fills in your organization's name' to the 'Transfer Detail:' dropdown (showing 'Transferred In') and the 'Organization name:' dropdown (showing 'Adams Memorial Hospital').
- An arrow points from 'Click "Save Exception" when finished. Repeat for all other transfers you are accepting.' to the 'Save Exception' button.

The form includes the following fields and buttons:

- Header: Enter Exception Details
- Fields: Your facility's MRN for this child: (text), Transfer Detail: (dropdown), Organization name: (dropdown), Exception Type: (dropdown), Date: (date picker), Notes: (text area).
- Buttons: << Back, Reset Fields, Save Exception, View Chip, Save and go to MSR Summary entry (checkbox).

- b. **Decline:** If the child is not at your facility, click “Decline.” INSTEP will remove the child from your MSR & re-assign this child’s exception to his/her birthing facility. *See “Editing a Declined Transfer” section for more information.*

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### Newborn Screening Exception Entry - August 2011

Use this form to report exceptions to the newborn screening heel stick process.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

14328 Search

Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

PID	ID	Name	DOB	BO	Exception	MRN	Lab Data		
5137107	1139	AARDVARK, CUB	08/01/2011	1	Transfer Only	789456	✓	Accept	Decline
5137109	1140	ANT, PUPA	08/02/2011	1	Transfer Only	234567	✓	Accept	Decline
5137111	1141	ANTELOPE, CALF	08/03/2011	1	Transfer Only	789451	✗	Accept	Decline
5137119	1146	CAT, SABLE	08/04/2011	2	Transfer Only	14328	✗	Accept	Decline

If the child is not at your facility, click the "Decline" link. INSTEP will remove the child from your MSR & re-assign this child's exception to his/her birthing facility.

**NOTE:** *You must accept or decline all transfers before you can close your MSR.*

## Editing a Declined Transfer

When a birthing facility declines a transfer, INSTEP re-assigns that child's exception to his/her birthing facility. ***Children whose transfers are declined will be highlighted in red on your MSR. These children will appear in the "Unresolved Holdovers" section of your Exception Entry list. You must correct all declined transfers before you can close your MSR.***

Hover your mouse over the "Edit Declined Transfer" link to see which facility declined the transfer.

Use this form to report exceptions to the newborn screening heel stick process.

Search for Child Record  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Enter MRN

Unresolved Holdovers  
There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

PID	ID	Name	DOB	BO	Exception	MRN	Lab Data	
5137119	1146	CAT, SABLE	08/04/2011	2	Transfer Only	14328		<a href="#">Edit Declined Transfer</a>

Outgoing transfer declined by Adams Memorial Hospital

Children whose transfers were declined by the receiving facility will be re-assigned to the birthing facility. These children will be highlighted in red on the "Unresolved Holdovers" section of your MSR.

Hover your mouse over the "Edit Declined Transfer" link to see which facility declined the transfer.

In order to correct the declined transfer:

1. Click the "Edit Declined Transfer" link. INSTEP will take you to the Exception Entry screen for this child.

Use this form to report exceptions to the newborn screening heel stick process.

Search for Child Record  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Enter MRN

Unresolved Holdovers  
There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

PID	ID	Name	DOB	BO	Exception	MRN	Lab Data	
5137119	1146	CAT, SABLE	08/04/2011	2	Transfer Only	14328		<a href="#">Edit Declined Transfer</a>

Click the "Edit Declined Transfer" link.

2. You can correct any information necessary. ***Most of the time, the transfer will be declined because an MSR user accidentally selected the wrong facility name within “Organization Name.”***
  - a. For example, if an MSR user accidentally selected “Adams Memorial Hospital” instead of “Auburn Birthing Center,” Adams Memorial would decline the transfer.
  - b. The exception would be re-assigned to the child’s birthing facility, which would edit the declined transfer so that the organization name correctly read “Auburn Birthing Center.”
3. Click “Save Exception” when you are finished editing the declined transfer.
  - a. INSTEP will re-assign the transfer to the new organization.
4. Repeat for all other declined transfers on your MSR.

Update any information for this child as needed. Most transfers will be declined because an incorrect organization was accidentally selected.

In this example, the MSR user at the child’s birthing facility corrected the organization name to Auburn Birthing Center.

Enter Exception Details

Transfer Detail:

Transferred Out

!

Organization name:

Auburn Birthing Center

!

Exception Type:

Transfer Only

!

Date:

8/4/2011

!

Notes:

<< Back

Reset Fields

Save Exception

View Chip

☐ Save and go to MSR Summary entry

Click “Save Exception” when you are finished editing the declined transfer. INSTEP will re-assign this transfer to the new organization.

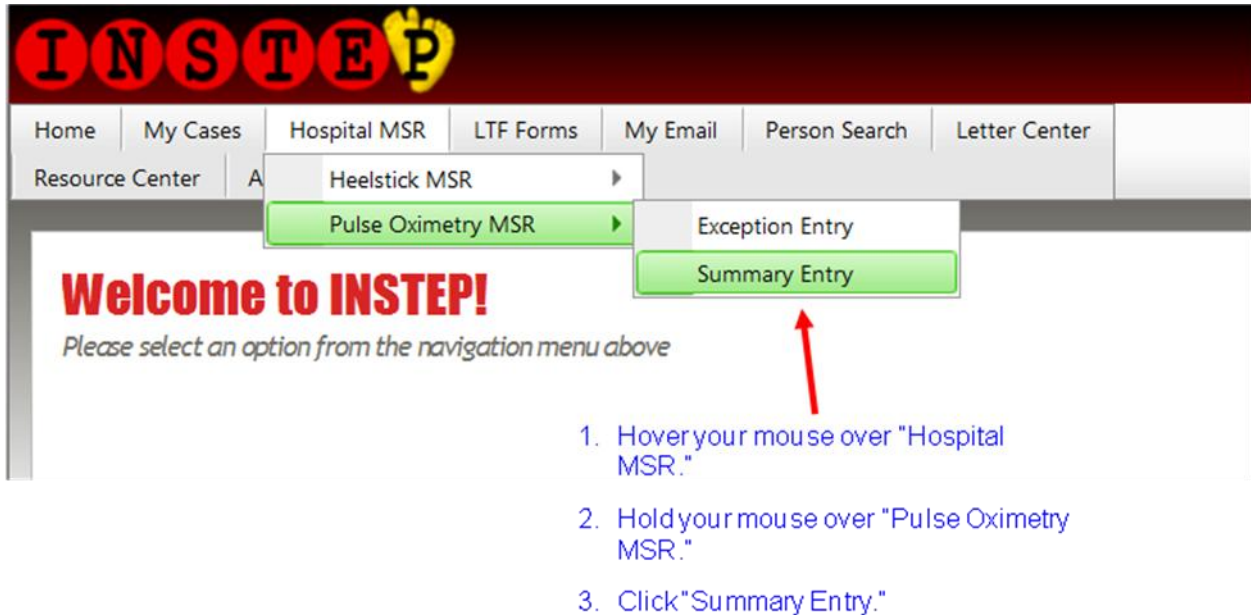
Repeat for all other declined transfers on your MSR.

**NOTE:** Remember, all MSR users ***must*** use INSTEP throughout the month in order for this feature to work. If all users submit their MSRs on the 14<sup>th</sup> of the following month, this feature will not function correctly—users at the receiving facilities will not have any transfers pre-populated. ***As a reminder, please report all exceptions within 5 days of the child’s birth or within 5 days of the exception.***

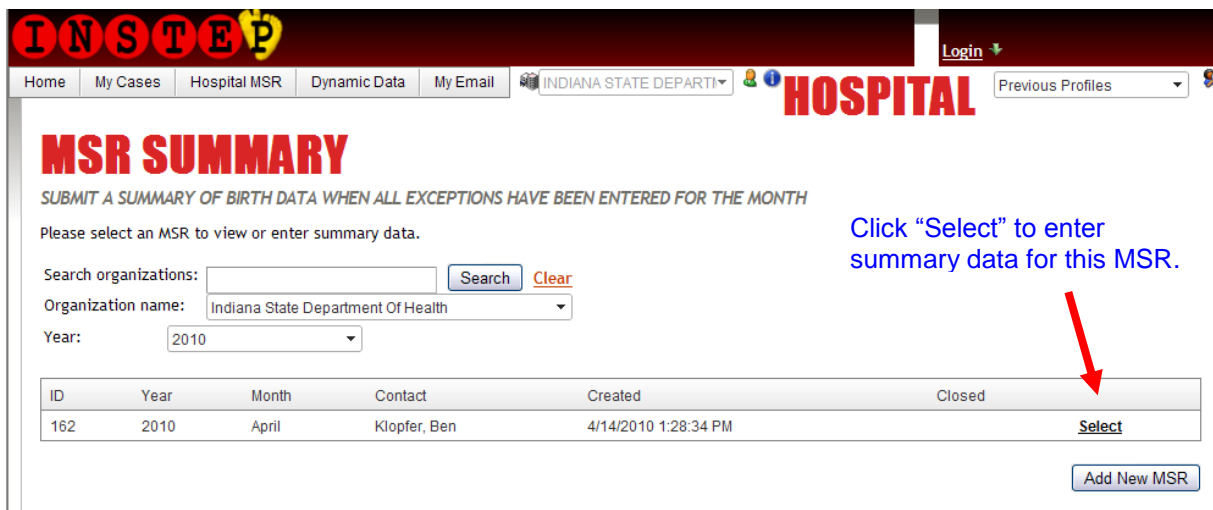
**NOTE:** ***You must edit all declined transfers before you can close your MSR.*** However, if a facility declines a transfer from your facility ***after*** your MSR is closed, INSTEP will assign the child’s transfer to the INSTEP Director for follow-up.

## Entering MSR Summary Data (“Summary Entry”)

After you have entered all exceptions for this month’s MSR and are ready to enter your MSR Summary data, **hover your mouse over the “Hospital MSR” tab at the top of the INSTEP screen. A drop-down list will appear. Click on “Summary Entry.”**



The screen will refresh with a list of open MSRs for your organization. Select the appropriate MSR to enter summary data.



1. The screen will refresh and display the MSR Summary Data form. **Enter the following information:**
  - a. Total number of live births at your facility this month
  - b. Total number of home births that received a pulse oximetry screen at your facility this month
  - c. Total number of walk-in patients who received a pulse oximetry screen at your facility this month
2. The number of exceptions reported and the number of screens will be automatically calculated based on the data that you provide.

**NOTE:** To move between the summary data fields, click your mouse on each box **OR** use the “Tab” key on your keyboard. INSTEP will not calculate the number of screens performed each month until you have entered all required summary data.

## MSR SUMMARY

SUBMIT A SUMMARY OF BIRTH DATA WHEN ALL EXCEPTIONS HAVE BEEN ENTERED FOR THE MONTH

Please select an MSR to view or enter summary data.

Search organizations:

Organization name:

Year:

ID	Year	Month	Contact	Created	Closed
162	2010	April	Klopfer, Ben	4/14/2010 1:28:34 PM	<input type="button" value="Select"/>

**MSR Summary Data**

Please enter the summary data for the MSR. Enter the total number of live births, home births, and walk-ins that received newborn screening at your facility during the month. Exceptions reported and number of normal screens will be calculated automatically based on entered data.

MSR Status:

Number of live births:

Number of home births that received screening:

Number of walk-ins that received screening:

Number of exceptions reported:

Number of screens:

Enter the total number of live births, home births that received screening, & walk-ins that received screening at your facility this month. Exceptions reported and # of screens will be automatically calculated.

**NOTE:** If you need to come back later to complete entering summary data for this MSR, click “Save.” This MSR will be saved within the INSTEP MSR Summary Entry section until you come back.

## Submitting Your MSR

When you have correctly entered all information and are ready to complete this MSR, click “Save and Close.” The screen will refresh and show you the date and time that you submitted the MSR.

The screenshot shows the INSTEP Newborn Screening Exception Entry form. The header includes the INSTEP logo, navigation links (Home, My Cases, Hospital MSR, Dynamic Data, My Email), the Indiana State Department of Health logo, a Login button, and a Previous Profiles dropdown. The main heading is "SCREENING EXCEPTION ENTRY" in large red letters, with a subtitle "USE THIS FORM TO REPORT EXCEPTIONS TO THE NEWBORN SCREENING HEEL STICK PROCESS." Below this, there is a link "Create or Select MSR" and a prompt "Select the year to see a list of MSRs." A "Year:" dropdown menu is set to "2010". Below the dropdown is a table with two rows of MSR data. The table has columns for ID, Year, Month, Contact, Created, and Closed. The first row has ID 162, Year 2010, Month April, Contact Klopfer, Ben, Created 4/14/2010 1:28:34 PM, and Closed. The second row has ID 241, Year 2010, Month August, Contact Klopfer, Ben, Created 4/22/2010 12:15:16 PM, and Closed 4/22/2010 12:31:52 PM. Each row has a "Select" link to its right. At the bottom right, there is a "May" dropdown menu and an "Add New MSR" button.

ID	Year	Month	Contact	Created	Closed	
162	2010	April	Klopfer, Ben	4/14/2010 1:28:34 PM		<a href="#">Select</a>
241	2010	August	Klopfer, Ben	4/22/2010 12:15:16 PM	4/22/2010 12:31:52 PM	<a href="#">Select</a>

### **Do NOT submit your MSR until you are completely finished!**

Once you click “Save and Close,” your MSR has been submitted to ISDH, and you cannot update or change it. If you wish to return to your MSR at a later date, please click “Save” – do NOT click “Save and Close” until you are ready to submit to ISDH!!

### **MSRs are due to ISDH by 5 pm on the first business day after the 14<sup>th</sup> of the month.**

Typically, the due date will be the 15<sup>th</sup> of the month.  
If the 15<sup>th</sup> falls on a weekend, MSRs are due to ISDH by 5 pm the following Monday.

## Printing Your MSR

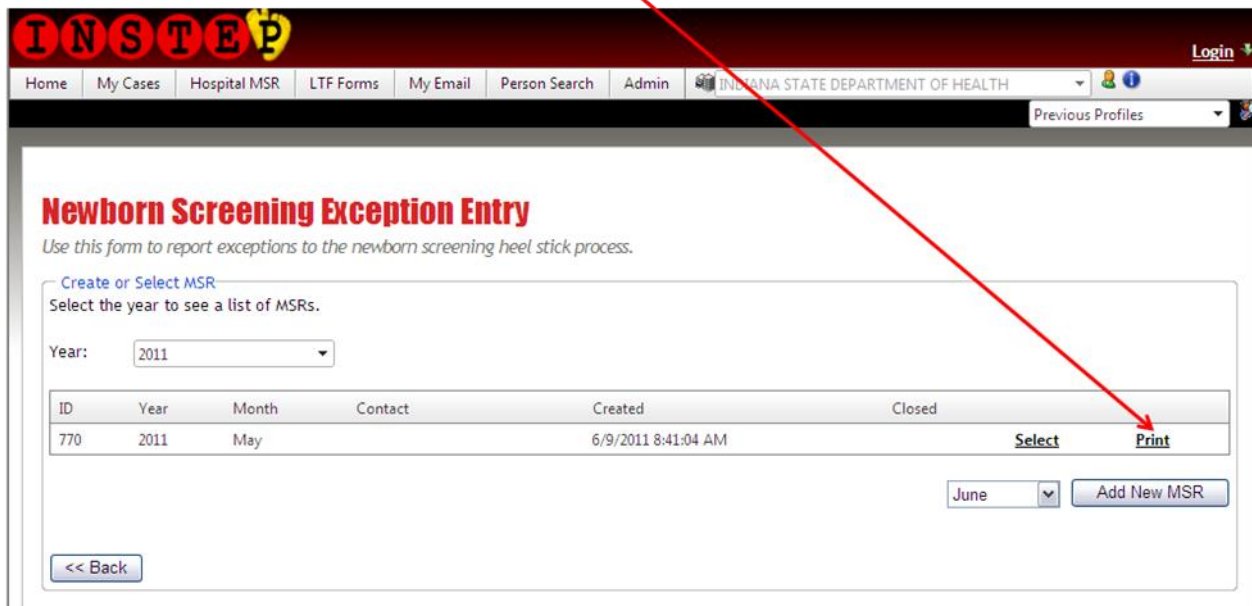
INSTEP allows you to print a copy of each month's MSR for your facility's records. **NOTE:** *MSRs print in a read-only PDF format. INSTEP users are not able to alter the MSR or printout in any fashion.*

You can print an MSR from the MSR Monthly Exception Report screen or from the Exception Entry screen. **NOTE:** *For information on printing an MSR from the MSR Monthly Exception Report screen, please see the "MSR Reports" section of this User Guide.*

### To print an MSR from the Exception Entry screen:

1. Log into INSTEP and go to the Exception Entry screen by hovering your mouse over the "Hospital MSR" menu and clicking "Exception Entry."
2. Click on the "Print" link next to the name of the MSR you want to print.

• Click the "Print" link next to the MSR you wish to print.



The screenshot shows the INSTEP web application interface. At the top is a navigation bar with the INSTEP logo and a 'Login' button. Below the navigation bar is a menu with options: Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, and Admin. The 'Hospital MSR' menu is highlighted. The main content area is titled 'Newborn Screening Exception Entry' and includes a description: 'Use this form to report exceptions to the newborn screening heel stick process.' Below this is a section for 'Create or Select MSR' with a 'Select the year to see a list of MSRs.' dropdown menu set to '2011'. A table displays a list of MSRs with columns: ID, Year, Month, Contact, Created, and Closed. The table contains one entry with ID 770, Year 2011, Month May, and Created 6/9/2011 8:41:04 AM. To the right of the table are 'Select' and 'Print' links. A red arrow points from the 'Print' link to the instruction text above. At the bottom of the table are a 'June' dropdown menu and an 'Add New MSR' button. A '<< Back' button is located at the bottom left of the form.

ID	Year	Month	Contact	Created	Closed
770	2011	May		6/9/2011 8:41:04 AM	



3. **INSTEP will automatically take you to the MSR Monthly Exception Report screen and display the selected MSR** (with the correct month and year). The MSR will be displayed in the bottom half of your screen.

- INSTEP will automatically take you to the MSR Monthly Exception Report.

- The MSR you selected will automatically be displayed in the lower half of the screen.

The screenshot shows the INSTEP web application interface. At the top is a navigation bar with the INSTEP logo and a menu including Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, and Admin. A dropdown menu for the Indiana State Department of Health is also visible. Below the navigation bar is a section titled "MSR Monthly Exception Report" with a "Return to Hospital MSR Reports page" button. Underneath, there are input fields for Facility (Bloomington Hospital), Year (2011), and Month (May), along with "Run" and "Clear" buttons. The main content area displays the "MSR MONTHLY EXCEPTION REPORT" with the following details: Facility : BLOOMINGTON HOSPITAL, Year : 2011, Month : May, MSR Created By : Alex Litvan, Opened : 6/9/2011, and Closed : .

**MSR Monthly Exception Report**

To view Hospital MSR Monthly Exception Reports.

Facility: BLOOMINGTON HOSPITAL  
Year: 2011  
Month: May

[Run](#) [Clear](#)

**MSR MONTHLY EXCEPTION REPORT**

Facility : BLOOMINGTON HOSPITAL  
Year : 2011  
Month : May  
MSR Created By : Alex Litvan  
Opened : 6/9/2011  
Closed :

4. **To print a hard (paper) copy of the MSR, scroll to the bottom of the screen and hover your mouse over the MSR report.** You should see the Adobe Acrobat toolbar appear.
5. **Click on the printer icon** to print the report.

- Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.
- Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21

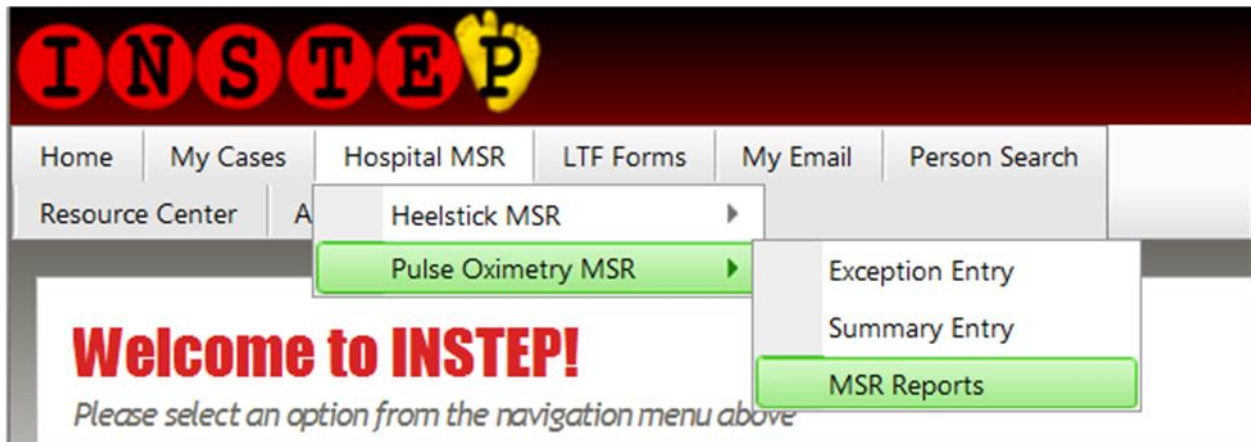


6. To print another MSR, change the date fields (month and year) at the top of the MSR Monthly Exception Report screen, then click "Run." Repeat this step as needed to print additional reports.

## MSR Reports

INSTEP allows users to run specific reports so that each facility can track its progress and performance. To access the INSTEP MSR Reports:

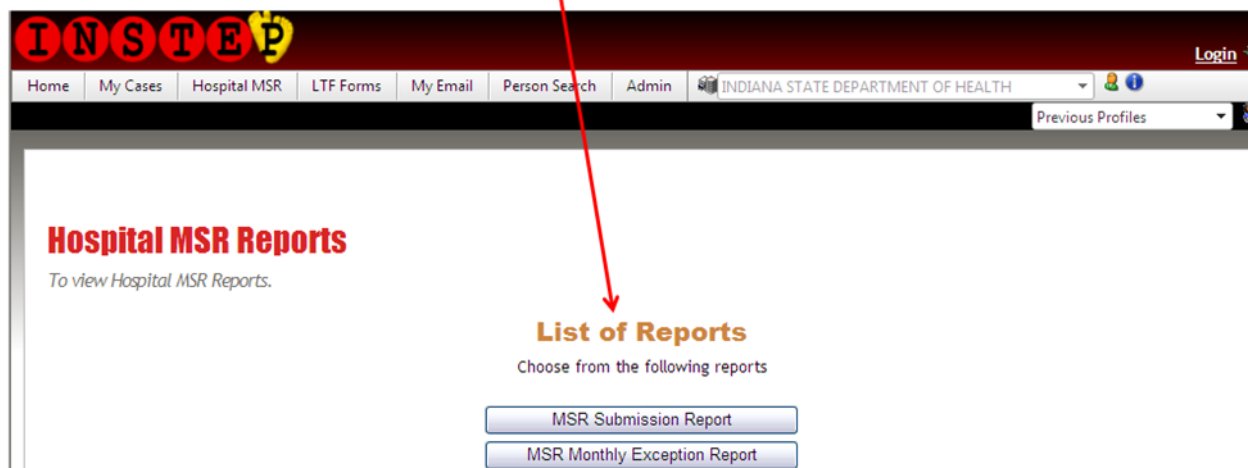
1. **Hover your mouse over the “Hospital MSR” menu.**
2. **Hover your mouse over the “Pulse Oximetry MSR” menu.**
3. **Click “MSR Reports” from the menu.**



1. Hover your mouse over the "Hospital MSR" menu.
2. Hover your mouse over the "Pulse Oximetry MSR" menu.
3. Click on "MSR Reports."

4. INSTEP will display the Pulse Oximetry MSR Reports page.

- INSTEP will display the Hospital MSR Reports screen.
- Click on the button of the report you wish to view and/or print.



**NOTE:** Each MSR Report page contains a button in the upper-right corner that reads, “Return to Hospital MSR Reports page.” You can click this button from any of the MSR Reports screens to return to the Hospital MSR Reports page and select another MSR report.

- Click this button to on any MSR Reports screen to return to the Hospital MSR Reports screen & select another report.



5. **Select one of the following reports to run:**

- a. **MSR Submission Report:** Includes the following items:
  - i. A grid that lists:
    - 1. Name of facility
    - 2. Selected year
    - 3. Name of person who created each MSR within the selected year
    - 4. Date each MSR was created
    - 5. Date each MSR was closed
    - 6. Status of all MSRs for a selected year (e.g., whether each MSR was submitted on time/late or is missing/open)
  - ii. A grid that summarizes the status (e.g., how many MSRs within the selected year were submitted on time? How many MSRs were late?)

**See page 46 for an example of an MSR Submission Report.**

- b. **MSR Monthly Exception Report:** Includes the following items:
  - i. Facility name
  - ii. Month/year of MSR
  - iii. Name of person who created MSR
  - iv. Date MSR was opened in INSTEP
  - v. Date MSR was closed in INSTEP
  - vi. List of individual exceptions reported for that month. For each exception, this report displays:
    - 1. PID (person unique identifier)
    - 2. Infant's name
    - 3. Infant's date of birth
    - 4. Exception code assigned to that infant
    - 5. Infant's Medical Record Number (MRN)
  - vii. List of summary data submitted for that month (as submitted by your facility)

**See page 49 for an example of an MSR Monthly Exception Report.**

## **MSR Submission Report**

To view and/or print an MSR Submission Report:

1. Click the **“MSR Submission Report”** button on the Pulse Oximetry MSR Reports page of INSTEP.
2. On the “MSR Submission Report” page, **check the boxes of the status(es) you wish to view** on this report.
  - a. INSTEP defaults to include all four statuses (on time, late, missing, and open) on each MSR Submission Report.
  - b. If you do not wish to view one or more of these statuses, uncheck the box next to the status you wish to remove.
3. **Select the year** of the MSR you wish to view and/or print from the drop-down menu labeled “Year.”
4. **Click “Run.”**
5. INSTEP will refresh & display the selected MSR Submission Report in the lower half of the screen.

**INSTEP** Login

Home My Cases Hospital MSR LTF Forms My Email Person Search Admin INDIANA STATE DEPARTMENT OF HEALTH Previous Profiles

### MSR Submission Report

[Return to Hospital MSR Reports page](#)

To view Hospital MSR Submission Reports.

Status: ☒ On Time ☒ Late ☒ Missing ☒ Open

Facility: BLOOMINGTON HOSPITAL

Year: 2011

[Run](#) [Clear](#)

<b><u>MSR SUBMISSION REPORT</u></b>				
Facility : BLOOMINGTON HOSPITAL				
Year : 2011				
<u>Month</u>	<u>Contact</u>	<u>Created Date</u>	<u>Closed Date</u>	<u>Status</u>
January				Missing
February				Missing

6. **To print a hard (paper) copy of the report, scroll to the bottom of the screen and hover your mouse over the report.** You should see the Adobe Acrobat toolbar appear.
7. **Click on the printer icon** to print the report.

- Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.
- Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21



## **Example of MSR Submission Report**

### **MSR SUBMISSION REPORT**

Facility :

Year : 2011

<b><u>Month</u></b>	<b><u>Contact</u></b>	<b><u>Created Date</u></b>	<b><u>Closed Date</u></b>	<b><u>Status</u></b>
January				Missing
February				Missing
March				Missing
April				Missing
May	Bridwell, Tonya	6/9/2011		Open
June	n/a	n/a	n/a	n/a
July	n/a	n/a	n/a	n/a
August	n/a	n/a	n/a	n/a
September	n/a	n/a	n/a	n/a
October	n/a	n/a	n/a	n/a
November	n/a	n/a	n/a	n/a
December	n/a	n/a	n/a	n/a

### **STATUS SUMMARY**

<b><u>Status</u></b>	<b><u>Total</u></b>
Submitted	0
On Time	0
Late	0
Unsubmitted	5
Missing	4
Open	1
Total	5



## **MSR Monthly Exception Report**

To view and/or print an MSR Monthly Exception Report:

1. **Click the “MSR Monthly Exception Report” button** on the Pulse Oximetry MSR Reports page of INSTEP.
2. **Select the year and month** of the MSR you wish to view and/or print from the drop-down menus labeled “Year” and “Month.”
3. **Click “Run.”**
4. **INSTEP will refresh and display the selected MSR Monthly Exception Report in the bottom half of your screen.**

• INSTEP will automatically take you to the MSR Monthly Exception Report.

• The MSR you selected will automatically be displayed in the lower half of the screen.

The screenshot shows the INSTEP web application interface. At the top is a navigation bar with the INSTEP logo and a 'Login' button. Below the navigation bar is a menu with links: Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, Admin, and a dropdown for the INDIANA STATE DEPARTMENT OF HEALTH. A 'Previous Profiles' dropdown is also visible. The main content area is titled 'MSR Monthly Exception Report' in red. Below the title is a button labeled 'Return to Hospital MSR Reports page'. Underneath, there are three dropdown menus for 'Facility:' (BLOOMINGTON HOSPITAL), 'Year:' (2011), and 'Month:' (May). Below these are 'Run' and 'Clear' buttons. The report content is displayed in a large box with the title 'MSR MONTHLY EXCEPTION REPORT' in bold. The report details are: Facility : BLOOMINGTON HOSPITAL, Year : 2011, Month : May, MSR Created By : Alex Litvan, Opened : 6/9/2011, and Closed : .

**MSR Monthly Exception Report**

To view Hospital MSR Monthly Exception Reports.

Facility: BLOOMINGTON HOSPITAL  
Year: 2011  
Month: May

[Run](#) [Clear](#)

**MSR MONTHLY EXCEPTION REPORT**


Facility : BLOOMINGTON HOSPITAL  
Year : 2011  
Month : May  
MSR Created By : Alex Litvan  
Opened : 6/9/2011  
Closed :

5. **To print a hard (paper) copy of the report, scroll to the bottom of the screen and hover your mouse over the report.** You should see the Adobe Acrobat toolbar appear.
6. **Click on the printer icon** to print the report.


• Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.

• Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21



Print file (Ctrl+P)



7. To print another MSR Monthly Exception report, change the date fields (month and year) at the top of the MSR Monthly Exception Report screen, then click "Run."
8. Follow steps 5 – 7 above to print additional reports.

## **Example of MSR Monthly Exception Report**

### **MSR MONTHLY EXCEPTION REPORT**

Facility :  
Year : 2011  
Month : May  
MSR Created By :  
Opened : 6/9/2011  
Closed :

PID	Name	DOB	Exception Code	MRN
5136338	WORKING, WORK	05/17/2011	Transfer Only	1
5136340	SECOND, TEST	05/02/2011	Transfer Only	2
5136349	HORSE, NELLY	05/24/2011	NICU	123456
5136354	A, B	05/10/2011	NICU	3
5136356	E, F	05/02/2011	Initial Screen Next Month	4
5136358	G, H	05/09/2011	Religious Refusal	5

### **SUMMARY DATA**

Number of live births	23
Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21

## **Sending a Secure E-mail through INSTEP**

INSTEP has a secure e-mail feature that allows INSTEP users to send and receive messages that contain protected health information (PHI) – or any detailed information about a specific child – safely and securely, without worrying about violating any HIPAA security or privacy rules.

To compose a secure message within INSTEP:

1. Start by accessing the Child Health Information Profile (CHIP) of the specific child about whom you are writing a message. You can access the CHIP by clicking on “Person Search” at the top of your INSTEP screen & completing the required fields (marked by a yellow triangle) *or* by clicking the “View the CHIP” link or button on your Exception Entry screen.
2. Click on the “Send an E-mail” button in the upper right corner of the CHIP.

3. INSTEP will display the Secure E-mail page.
  - a. Select the name of the recipient by clicking on the “To” drop-down menu and picking the person’s name.
  - b. Select the name of another recipient by clicking on the “CC” drop-down menu and picking the person’s name.
  - c. Type the e-mail’s subject in the “Subject” line.
  - d. Type your message in the “Body” text box. ***Do not delete any text under the line marked “ISDH USE.”***
  - e. If you wish to add any attachments to your message, use the “Upload a file” feature at the bottom of the screen. *See the “Religious Waiver” exception section of this User Guide for step-by-step instructions for uploading files.*
  - f. When you are finished with your message, click “Send.”

**ACTION EMAIL**

Send an email to a user of the INSTEP application.

1. Select the name of your recipient in the “To” drop-down menu.
2. Select the name of another recipient, if needed, in the “CC” drop-down menu.
3. Enter your subject in the “Subject” line.
4. Type your message in the “Body” text box.

Do NOT delete any information below the “ISDH USE Please Do Not Remove” line.

When finished, click “Send.”

If you wish to upload attachments to this e-mail, use the “Upload a File” feature.

**ATTACHED FILES**

Upload a file:

Files:  
0 file(s) found.

The screenshot shows a web form for sending an email. It includes fields for 'To' and 'CC' (both dropdown menus), a 'Subject' text box, and a large 'Body' text area. The body text area contains a pre-filled message: '----- ISDH USE Please Do Not Remove -----' followed by 'PID :5137137'. Below the body text area are 'Send' and 'Cancel' buttons. At the bottom of the form is an 'ATTACHED FILES' section with an 'Upload a file:' label, a file input field, a 'Browse...' button, and an 'Upload' button. A list of files is shown below, currently empty.

4. INSTEP will send & store your e-mail message securely.
  - a. ***Your actual message will stay within INSTEP—no PHI will be released outside of INSTEP.***
  - b. Instead of seeing your actual message (containing the PHI about the child) in his/her e-mail inbox, your recipient(s) will receive notification that a secure e-mail is awaiting them in INSTEP.
  - c. The recipient(s) can click on the link in this message to log into INSTEP and access their “My E-mail” page to see your message.

---

**ISDH INSTEP Email Notice**

ceddy@isdh.in.gov

This message was sent with High importance.

Sent: Tue 8/16/2011 10:38 AM

To: Eddy, Courtney

---

Courtney Eddy has sent you a secured email.

To Access your message, simply follow these steps:

1. [Click here](#) to login and view the contents of this secured email.
2. Enter your user name and password when prompted.
3. Access your inbox to view the message.

If your email software does not support the 'Click Here' link above, copy the URL below and paste it into the address bar on your web browser.

<https://gatewaydev.isdh.in.gov/GatewayTst/SignIn.aspx?appid=71&redirectTo=INSTEP/MyEmail.aspx>

5. Your “My E-mail” page in INSTEP will display all e-mail messages you have sent or received through INSTEP.
- For details of an individual message, click the arrow to the left of the message.
  - To reply to a message, click the “Reply” link.
  - To delete a message in your Received or Sent e-mails, click the “X” icon. You will be asked for confirmation that you wish to delete the message.
  - You can also sort your messages by clicking on any of the column headers within the My E-mail page (such as “From,” “Reply Date,” etc.).

**My Email**

*Received Email*

Click here to reply to an e-mail you have received in INSTEP.

Click this arrow to see details about a specific message.

Drag a column header and drop it here to group by that column

Refresh list

	RECEIVED DATE	FROM	SUBJECT	MESSAGE	READ DATE	REPLY DATE	
>	8/16/2011	Courtney Eddy	test	test message	8/16/2011	<a href="#">Reply</a>	X

*Sent Email*

Click here to delete an e-mail message.

Refresh list

	SENT DATE	TO	SUBJECT	MESSAGE	READ DATE	REPLY DATE	
>	8/16/2011	Courtney Eddy	test	test message	8/16/2011		X

## **Frequently Asked Questions (FAQs)**

### **Why can't I log into the Gateway?**

You must register for an account within the Gateway before you can log into the Gateway. In order to register for a Gateway account, make sure you've obtained the Gateway security code from ISDH. For more information about registering for a Gateway account, see pages 4 – 6 of this User Guide.

### **Why don't I see INSTEP as a tab on my Gateway home page?**

You must request and be granted access to INSTEP before you will see an "INSTEP" tab on your Gateway home page. If you are a current Gateway user, you will need to request access to INSTEP through the Gateway home page. For more information, see pages 8 – 11 of this User Guide.

### **How do I add a child to an MSR if I can't find him/her by MRN?**

If you **search for a child by medical record number (MRN) and no matches are found** within the INSTEP database, you will be automatically sent to the Exception Entry screen, where you will be able to enter demographic information for the child, his/her mother, and his/her primary care provider, as well as the exception information.

If you **search for a child by MRN and cannot find the child in the list of potential matches** that are found within the INSTEP database, click the "Child Not Listed" button to manually enter the child's information.

For more information about entering demographic information within INSTEP, please see pages 20 – 23 of this User Guide.

### **Why can't I create a new MSR?**

INSTEP will not allow you to open a new MSR if the previous month's MSR has not been completed & submitted. INSTEP works like this so all "holdovers" are addressed appropriately the next month.

### **How do I add an MSR if I only need to enter summary data?**

Users who need to enter an MSR with no exceptions can click on "Summary Entry" in the Hospital MSR menu. On the Summary Entry screen, make sure that you have selected the correct month & year of MSR, then click the "Add New MSR" button. INSTEP will refresh & display your new MSR in the list of MSRs for the current calendar year. Enter summary data as usual.



## Why are children from last month's MSR automatically appearing on my MSR for this month?

These children are “holdovers” from the previous month. Certain exception codes (“Discharged without Pulse Oximetry Screen,” “NICU,” “Initial Screen Next Month,” etc.) will require you to **promote**, or update, the child's status on the next month's MSR.

**Example:** If a child was listed with the “NICU” exception code and received his/her pulse oximetry screen the following month, this child can be promoted / updated to “Finally Screened.” The child will not appear on the next MSR.

## Should I enter time in 12-hour or 24-hour format?

Please enter times in INSTEP in a 24-hour (military) format (e.g., 11:15 PM = 2315). Be sure that you enter a “leading zero” for all times before 10 AM (e.g., 5:20 AM = 0520). Do not use a colon (e.g., 10:00 AM = 1000).

## What if I don't know the baby's first name?

INSTEP contains a checkbox labeled “Child's first name is unknown.” You should ***not*** enter a child's first name as “Baby,” “Baby Boy/Girl,” or “Infant.” If you don't know the infant's first name, or if the infant does not yet have a first name, please check this box and leave the “First Name” text box blank.

## How should I report a baby if his/her name has changed?

Report the child with his/her ***current legal name***.

- If the child's previous last name is the same as the mother's maiden name, report that name in the “Maiden Name” box.
- Do NOT report a child's name as “Smith (Jones)” or “Smith PREV Jones.” INSTEP will not be able to match this child's record with his/her birth certificate & NBS lab results!
- Remember that you can always update a child's name in INSTEP **until you close your MSR for the month**. Once an MSR is closed, information can no longer be updated for that child's record.

## How should I assign birth order for twins, triplets, etc.?

Birth order should be matched to the assigned order from the babies' birth facility. If a set of twins is transferred to your facility, infant B (2) at your facility should have been infant B (2) at the birth facility. Incorrect information can lead to duplicated or incorrectly merged records within the ISDH Repository.

## What children should be reported as transfers in/out of my facility?

The new MSR form requires you to tell us about all children who enter or leave your hospital ***before having a pulse oximetry screen***. You should report ALL of the following:

- ***Transferred in to your facility:*** Every baby who was born at another facility, but comes to your facility ***without having a valid pulse oximetry screen***
- ***Transferred to another facility:*** Every baby who leaves your facility ***without having had a valid pulse oximetry screening***

**NOTE:** You do **NOT** need to report children who are transferred in/out ***AFTER receiving a valid pulse oximetry screen***.

### **How should I report a child who was transferred into my facility and received a valid pulse oximetry screen before I submitted my MSR?**

- The *transfer code* for this child should be “Transferred into your facility.”
- The *exception code* for this child should be “**Finally Screened.**”
  - Do **NOT** this child with the “Transfer Only” exception code.
  - Be sure to include the date the child received his/her pulse oximetry screen!

### **If a child was transferred in/out multiple times during the same month, how do I report that?**

List the transfer code for whatever action happened LAST. For example, if a child was transferred out of your facility, back to your facility, and then out to another facility, that child would be reported on your MSR as “Transferred to another facility.”

### **What if a child was transferred to a hospital outside Indiana before having a valid pulse oximetry screen?**

These children should be reported with the “Transfer Out” transfer code. Enter the date that the child was transferred to the out-of-state facility.

**NOTE:** You should be able to select the out-of-state organization’s name within the “Organization” drop-down menu for your transfer. If you can’t locate a facility in INSTEP, please contact ISDH with the hospital’s name and address so the facility can be added to INSTEP.

### **How should I report a child who does not pass his/her pulse oximetry screen?**

These children should be reported with the following codes:

- Transfer code = ***Not Transferred***
- Exception code = ***Did Not Pass Pulse Oximetry Screen***

Be sure to include the date of the child’s pulse oximetry screen & the name of the facility where the child will be receiving his/her pediatric cardiology follow-up services.

**NOTE:** Do **NOT** report these children with the “Transferred Out” transfer code. This transfer code is only used for children who leave a birthing facility without having a valid pulse oximetry screen.

## How should I report NICU babies?

What happened with this baby?	Your transfer code should be...	Your exception code should be...
Baby transferred to a NICU at another facility	Transferred to another facility	TRANSFER ONLY
Baby transferred to your hospital's NICU, <u>screened in same calendar month</u>	Transferred to your facility	FINALLY SCREENED (provide date of pulse oximetry screen)
Baby transferred to your hospital's NICU, but <u>did NOT receive pulse oximetry screen in same calendar month</u>	Transferred to your facility	NICU (no date required)  **This child will be a holdover on next month's MSR**

## Do I need to report babies born at the end of a calendar month as “Initial Screen Next Month” exceptions?

ONLY if that child has not received his/her pulse oximetry screen by the time you submit your MSR. Children who are born at the end of a calendar month, but receive the pulse oximetry screen before you submit your MSR are considered **normal** screens and don't need to be reported.

## How do I tally my exceptions each month?

ANY child that you report as an exception on your MSR counts as an exception, regardless of the transfer or exception codes. This includes any children who are “Transfer Only” exceptions or were promoted to “Finally Screened.” INSTEP will calculate your exceptions and total number of initial screens for you.

We realize that the number of initial screens reported in INSTEP may not match the number of initial screens recorded in your NBS log at your facility. This is okay! ISDH is no longer focusing on matching numbers—our follow-up is focused on ensuring that every child born in Indiana receives a valid, complete initial NBS (including pulse oximetry screen).

## Can I print my MSR?

Yes, you can! See the section “Printing Your MSR” within this User Guide for more information.

## Is INSTEP compatible with Macintosh computers?

Currently, INSTEP is not fully compatible with Mac computers. Mac users may have reduced functionality of some components of INSTEP.

## What types of files can I upload to INSTEP?

Currently, INSTEP will accept the following types of files: pdf, tiff, bmp, gif, png, doc, xls, docx,xlsx, xps, jpg, jpeg.

## **ISDH Contact Information**

<b><u>Person to Contact</u></b>	<b><u>Issue/Question</u></b>
<b>Eileen White</b> <i>Chief Nurse Consultant</i> (317) 233 – 1379 (317) 234 – 2995 (fax) <a href="mailto:EWhite1@isdh.IN.gov">EWhite1@isdh.IN.gov</a>	<ul style="list-style-type: none"><li>• Patient-specific questions</li><li>• Questions about NBS follow-up</li><li>• Submitting signed Religious Waiver or other NBS follow-up information <b>via fax (paper copies)</b></li></ul>
<b>Courtney Eddy</b> <i>INSTEP Director</i> (317) 233 – 9260 (317) 234 – 2995 (fax) <a href="mailto:CEddy@isdh.IN.gov">CEddy@isdh.IN.gov</a>	<ul style="list-style-type: none"><li>• Questions about using INSTEP</li><li>• Requesting Gateway/INSTEP security codes</li><li>• Questions about the NBS law and/or legal rules</li><li>• All other NBS questions/issues</li></ul>